OrgPublisher 9 User Guide



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CHAPTER 1

WHAT'S NEW

New with This Version

New Features	OrgPublisher Premier	OrgPublisher 9
OrgSuccession Features		
9 Box Matrix Wizard	X	
Modifying 9 Box Matrix Results	X	
Printing a 9 Box Matrix	X	
Displaying a 9 Box Matrix in Side-by-Side Profile View	X	
Succession Planning for Administrators	X	
Publishing a Chart for Succession Planning	X	
Drag and Drop from 9 Box Matrix in Planning Charts	X	
Creating a Side-by-Side Profile View	X	
Create groups from pinned side-by-side profiles	X	
Auto Pinning Group or Search Results as Side-by-Side Profiles	X	
Org Model Planning Enhancements		
Managing Planning Charts	X	
Storing Planning Charts	X	
Setting Change Report Default Options	X	
Enabling a Visual Change Indicator in the Planning Chart	X	
Using Advanced Box Layout with Organizational Model Planning	X	
Setting Levels for Planning Charts	X	
Updating an Open Position in Planning Charts	X	
Changing a Planning Chart Job Title and Position Type	X	
Cut and paste to move a box or span of control	X	
Creating a 9 Box Matrix	X	
Workforce Analysis Graphs		
Creating Workforce Analysis Graphs	X	X

New Features	OrgPublisher Premier	OrgPublisher 9
Selecting Graph Categories	X	X
Using the Graphs Tab Toolbar	X	X
Printing a Workforce Analysis Graph	X	X
Resizing Workforce Analysis Graphs	X	X
Publishing Features		
Publishing in Express Mode	X	X
Disabling PluginX Screen Capture	X	X
Selecting Role-based Toolbars	X	X
Auto-archiving Charts	X	X
Security Features		
Setting Field Security Based on Group Membership	X	X
Views and Dialogs		
Viewing the Tabbed Profile	X	X
Using the Tabbed Style Selector	X	X
Viewing the Tabbed Hover Profile	X	X
Maximizing Docked Views	X	X
Resizing Dialogs	X	X
Formatting Features		
Enabling End User Personalization	X	X
Using Additional Gradient Options	X	X
Using Dynamic Chart Layouts	X	X
Chart Action Buttons		
Enabling Action Buttons	X	X
Selecting Chart Action Button Options	X	X
Using Chart Action Buttons	X	X
Menus and Toolbars		
Sending Feedback to Aquire	X	X
Using Enhanced Toolbar Search and Find Features	X	X
Using Click and Drag Scrolling	X	X

Note: *If you renewed maintenance from a previous OrgPublisher Enterprise version that included the organizational planning client, that feature is included in the OrgPublisher 9 version.*

OrgSuccession

9 Box Matrix Wizard

Available in OrgPublisher Premier, the *9 Box Matrix Wizard* walks you through selecting fields for the X-axis (horizontal line) of 3 boxes assessing performance and the Y-axis of 3 boxes (vertical line) assessing potential. A combination of the Y and X axis determines the box within the grid where the employee is placed. The top right-most box displays **High Performance**/**High Potential** employees, while the bottom left-most box contains **Low Performance**/**Low Potential**.

In addition to the fields you want to use for analysis, you can also select group and position type filters, range limits, and sort order.

Note: *Records displayed in the 9 Box Matrix are associated with the level displayed in the Chart View.*

With the *9 Box Matrix Wizard*, you can:

Creating a 9 Box Matrix

Defining 9 Box Performance Field Range Values

Defining 9 Box Potential Field Range Values

Selecting 9 Box Potential and Performance Fields

Filtering Groups in the 9 Box Matrix

Filtering Position Types in the 9 Box Matrix

Modifying 9 Box Matrix Results

Sorting the 9 Box Matrix

Creating a 9 Box Matrix

The *9 Box Matrix* feature is available in OrgPublisher Premier. Chart planners can determine the fields used in a planning chart.

1. Open your chart and click the 9 Box Matrix button  , either in the Views toolbar or the Profile View.

2. Click the Maximize docked window button .



Figure 1

3. The 9 Box Matrix View opens. It contains no data yet. If no matrix currently exists, the *9 Box Matrix Wizard* opens automatically.

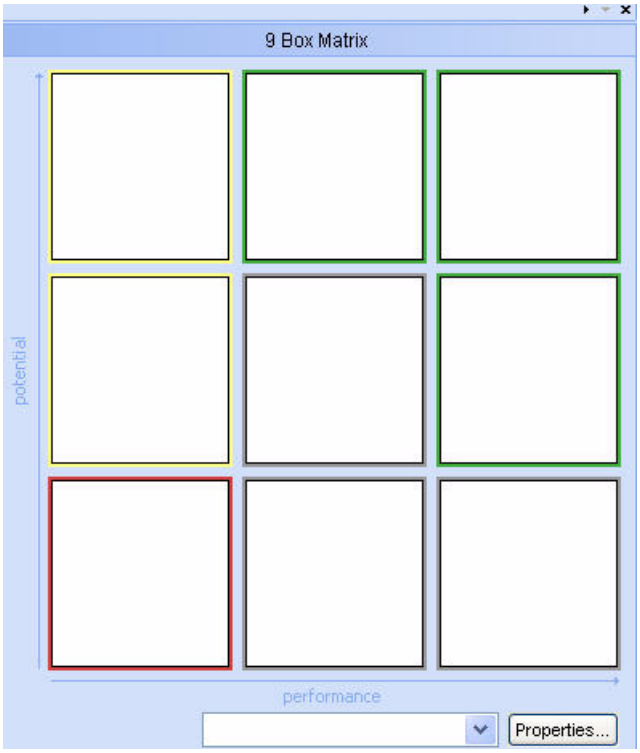


Figure 2

4. If a matrix currently exists, click **Tools** in the Main menu then select **9 Box Matrix Wizard** from the options list to open the wizard.

5. Click **Next** on the first screen. In the **Potential** section, click the down arrow in the **Field Name** field to choose the field you want to use for employee potential.

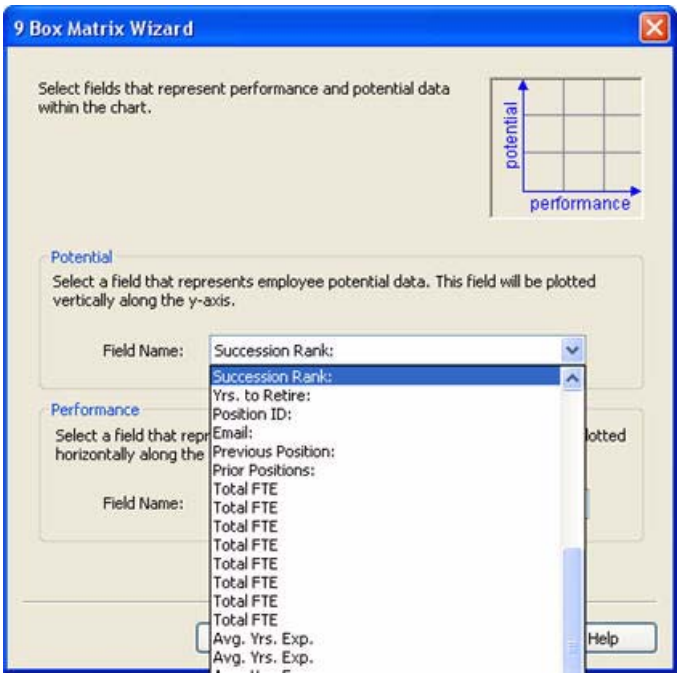


Figure 3

6. In the **Performance** section, click the down arrow to choose the field you want to use for current performance rating. Click **Next**.

7. Type the values that place the employees into the low, average, and high ranges for the potential axis.

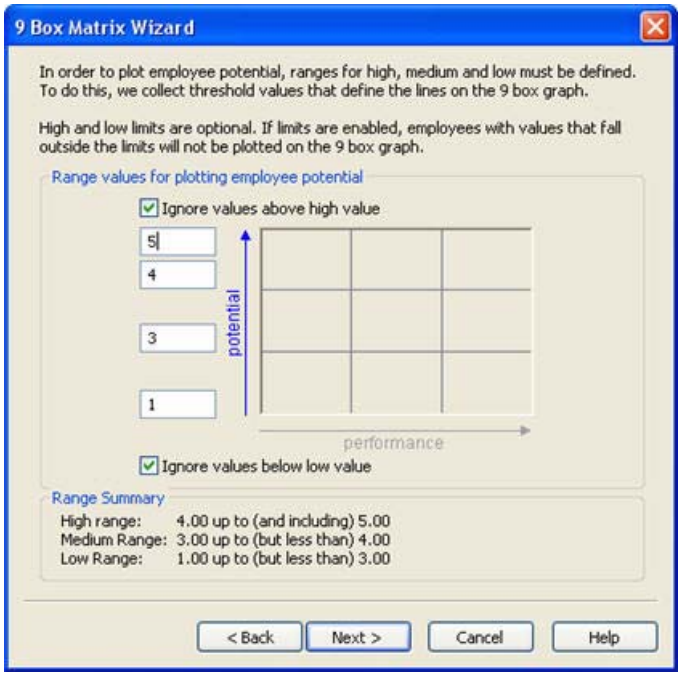

9 Box Matrix Wizard
In order to plot employee potential, ranges for high, medium and low must be defined. To do this, we collect threshold values that define the lines on the 9 box graph.
High and low limits are optional. If limits are enabled, employees with values that fall outside the limits will not be plotted on the 9 box graph.
Range values for plotting employee potential
Ignore values above high value
5
4
3
1
potential
performance
Ignore values below low value
Range Summary
High range: 4.00 up to (and including) 5.00
Medium Range: 3.00 up to (but less than) 4.00
Low Range: 1.00 up to (but less than) 3.00
< Back
Next >
Cancel
Help

Figure 4

8. Select the **Ignore values above high value** check box if you want to indicate a maximum number to end (**High Range**). Select the Ignore values below low value check box to indicate a minimum number to start (**Low Range**). If these check boxes are not selected, any records with a value below 1.00 or above 5.00 (in this example) are placed in the appropriate row.

   When the low limit, high limit, or both are set, records that fall outside of this range do not appear in the matrix.

9. Click **Next**. Type the values that place the employees into the low, average, and high ranges for the performance axis.

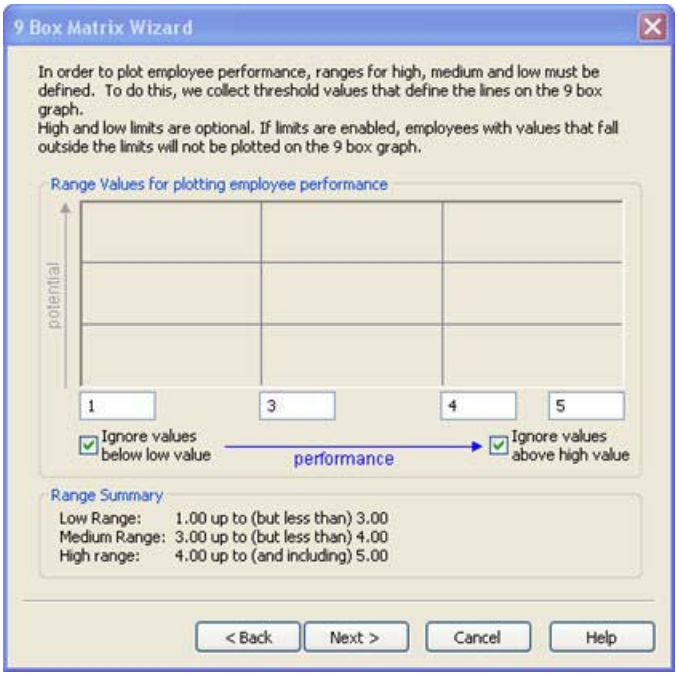

9 Box Matrix Wizard
In order to plot employee performance, ranges for high, medium and low must be defined. To do this, we collect threshold values that define the lines on the 9 box graph.
High and low limits are optional. If limits are enabled, employees with values that fall outside the limits will not be plotted on the 9 box graph.
Range Values for plotting employee performance
potential
1
3
4
5
Ignore values below low value
performance
Ignore values above high value
Range Summary
Low Range: 1.00 up to (but less than) 3.00
Medium Range: 3.00 up to (but less than) 4.00
High range: 4.00 up to (and including) 5.00
< Back
Next >
Cancel
Help

Figure 5

10. Select the **Ignore values below low value** check box if you want to indicate a maximum number to end (**High Range**). Select the Ignore values below low value check box to indicate a minimum number to start (**Low Range**). If these check boxes are not selected, any records with a value below 1.00 or above 5.00 (in this example) are placed in the appropriate row.

11. Click **Next**. You can choose to **Proceed to chart** to see all charted records positioned in the *9 Box Matrix* or choose to **Provide additional customization**, such as formatting and filtering. Click **Next**.

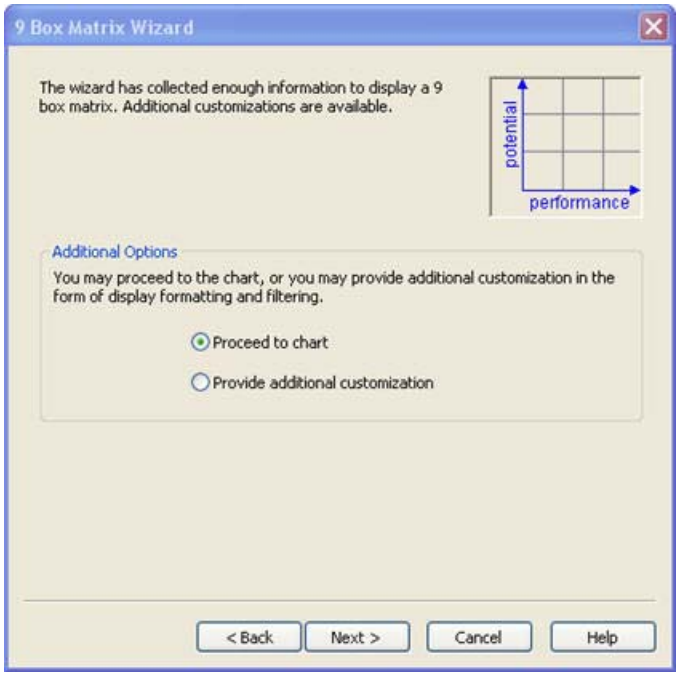

9 Box Matrix Wizard
The wizard has collected enough information to display a 9 box matrix. Additional customizations are available.
potential
performance
Additional Options
You may proceed to the chart, or you may provide additional customization in the form of display formatting and filtering.
Proceed to chart
Provide additional customization
< Back
Next >
Cancel
Help

Figure 6

12. If you select to add additional customization, the first option is to choose a **Field name** and **Sort order**, **Ascending** or **Descending**, within each box.

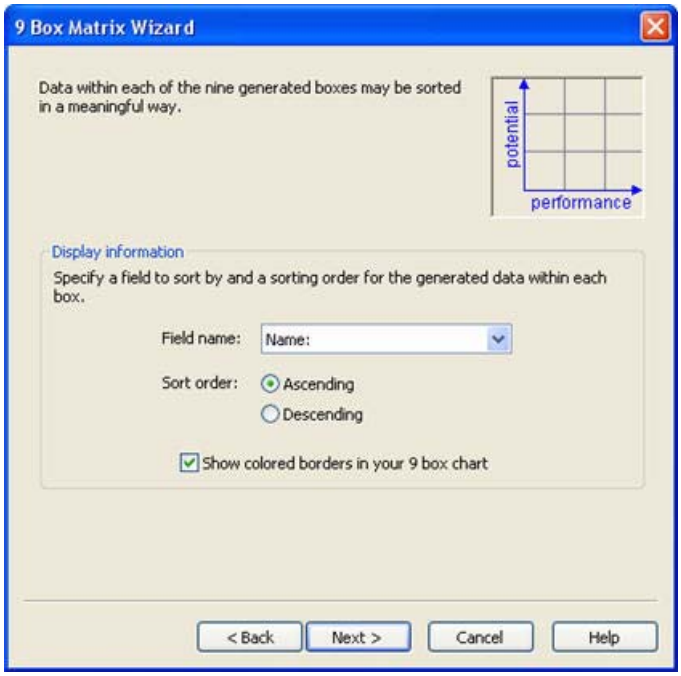

9 Box Matrix Wizard
Data within each of the nine generated boxes may be sorted in a meaningful way.
potential
performance
Display information
Specify a field to sort by and a sorting order for the generated data within each box.
Field name:
Name:
Sort order:
Ascending
Descending
Show colored borders in your 9 box chart
< Back
Next >
Cancel
Help

Figure 7

13. Select the **Show colored borders in your 9 box chart** if you want to add color format to the *9 Box Matrix*. Click **Next**.

14. Select the data filters to use in the matrix. **By position type** allows you to select the position types to include in the matrix. **By group** allows you to select the groups to use in the matrix. Click **Next**.

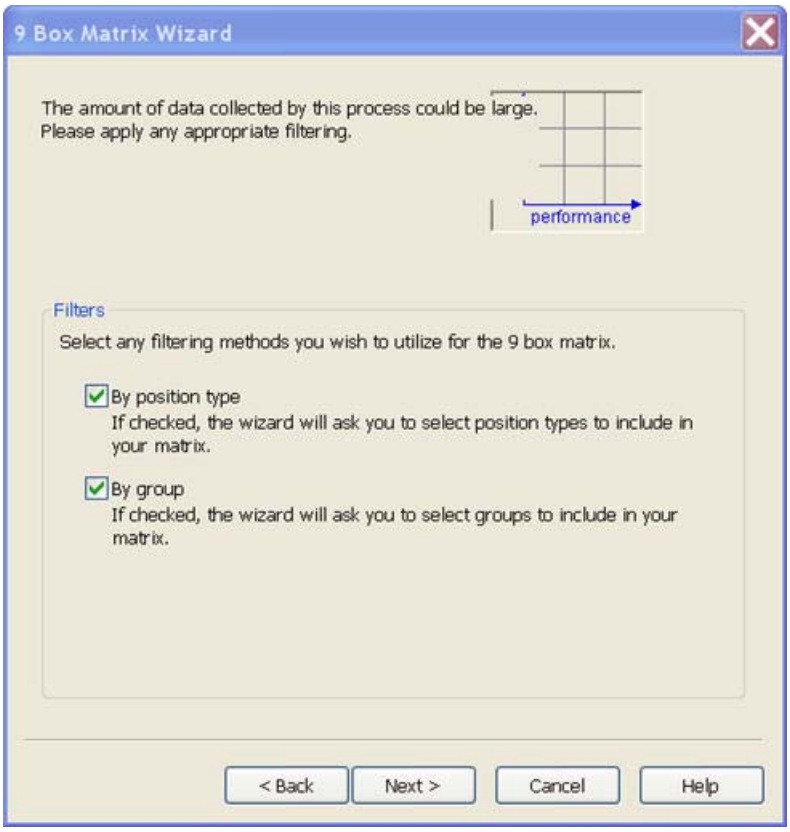

9 Box Matrix Wizard
The amount of data collected by this process could be large.
Please apply any appropriate filtering.
performance
Filters
Select any filtering methods you wish to utilize for the 9 box matrix.
By position type
If checked, the wizard will ask you to select position types to include in your matrix.
By group
If checked, the wizard will ask you to select groups to include in your matrix.
< Back
Next >
Cancel
Help

Figure 8

15. If you select the **By position type**, this dialog enables you to select the position types you want to include in the *9 Box Matrix*. You also have the option to **Select All** or **Clear All**. Click **Next**.

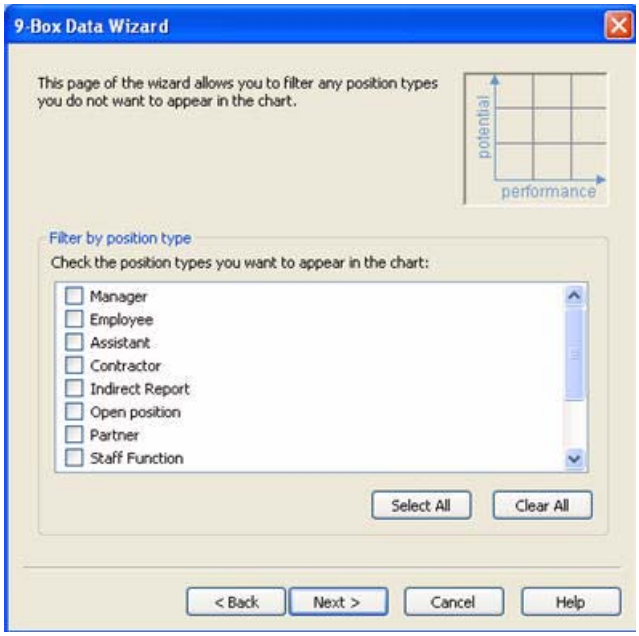


Figure 9

16. If you select **By group**, the next dialog enables you to select the groups you want to include in the *9 Box Matrix*. You also have the option to **Select All** or **Clear All**. Click **Next**.

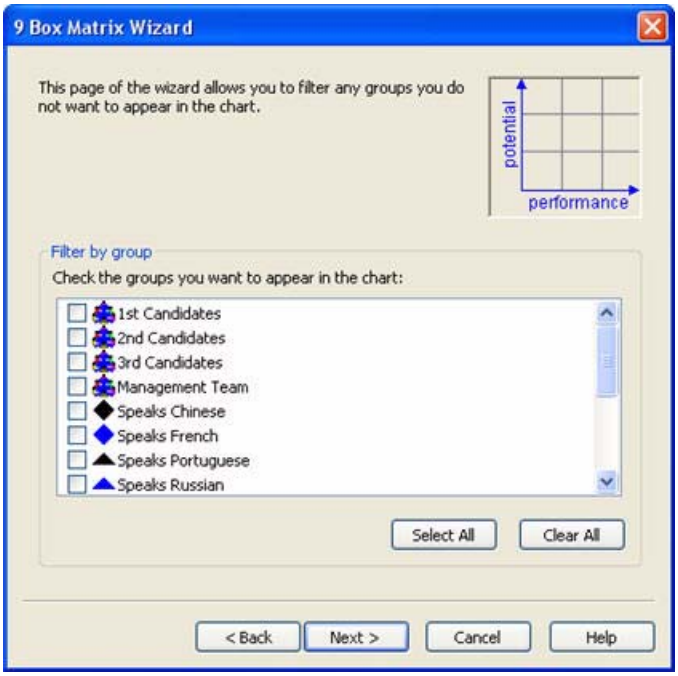


Figure 10

17. Click **Next**. The wizard displays a summary of your *9 Box Matrix* selections. Click **Back** if you want to modify any selections. Click **Finish** to populate and open the *9 Box Matrix*.

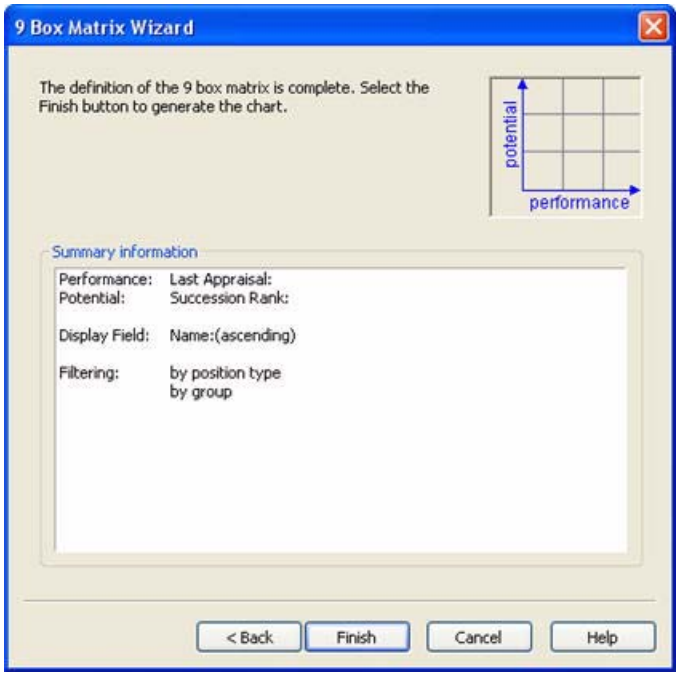


Figure 11

The 9 Box Matrix View opens, using the field names you selected for potential and performance. The records in each box are displayed alphabetically by **Last name**, **First name**.

If needed, refine the *9 Box Matrix* criteria for more selective results.

Creating a 9 Box Matrix from Pinned Profiles in a Published Chart

The 9 Box Matrix button  is also available with pinned profiles (OrgPublisher Premier), and can be used in published PluginX and EChart rich client charts. The chart administrator sets the values in the *9 Box Matrix Wizard* to display the matrix in a PluginX or EChart rich client chart. Planners are prompted to set their own values within a planning chart.

You can print the *9 Box Matrix* if the Print Wizard has been activated. You are prompted to print the chart or the *9 Box Matrix*. If the *9 Box Matrix View* is maximized, the *9 Box Matrix View* prints automatically.

Note: *If a 9 Box Matrix is not defined in the original chart, the feature is disabled in the published chart.*

You may receive an error message stating that "The specified graph size is too small to display the graph with current graph options." Modify the matrix size or the criteria used to create the matrix.

Selecting 9 Box Potential and Performance Fields

When you create a *9 Box Matrix*, available in OrgPublisher Premier, you select fields you want to use to represent the potential and performance measurements in your matrix.

1. Open your chart and click the 9 Box Matrix button  .
   The 9 Box Matrix View opens. If no matrix currently exists, the *9 Box Matrix Wizard* opens automatically.
2. If a matrix currently exists, click **Tools** in the Main menu then select **9 Box Data Wizard** from the options list to open the wizard.
3. Click **Next** in the first wizard dialog to reach the select fields dialog.

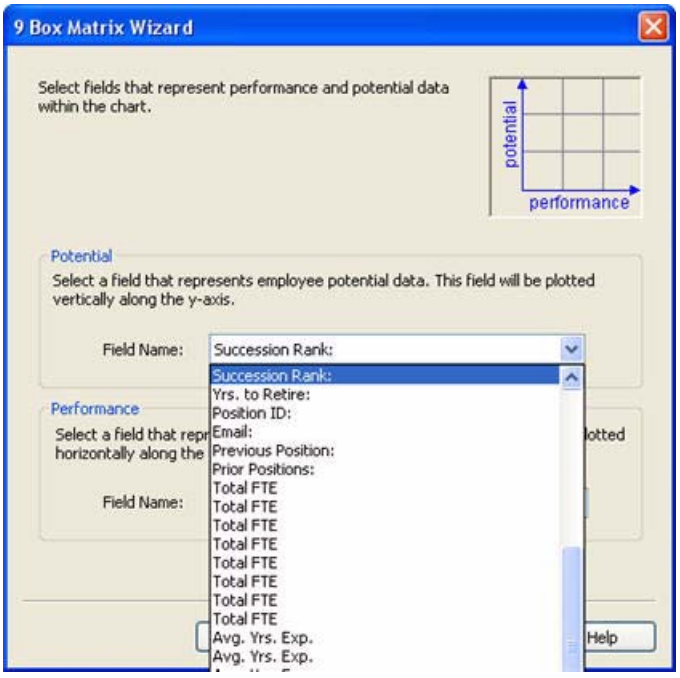


Figure 12

4. In the **Potential** section of the dialog, click the down arrow in the **Field Name** to select the field you want to use to measure the potential of employees in the matrix results.

5. In the **Performance** section of the dialog, click the down arrow in the **Field Name** to select the field you want to use to measure the performance of employees in the matrix results. Click **Next**.

6. Complete the wizard to select range values, sort field, and filter options then click **Finish** to view the *9 Box Matrix*.

Defining 9 Box Potential Field Range Values

Before you can plot employee potential, the Y-axis (vertical line) of 3 boxes, in the *9 Box Matrix*, available in OrgPublisher Premier, you must define the low, medium, and high ranges. When you set limits, employees who fall outside the limits are not plotted in the matrix. The medium value is required, but the high and low values are optional.

1. Open the *9 Box Matrix Wizard* by selecting **Tools** from the Main menu then **9 Box Matrix Wizard** from the options list. You can also click the 9 Box Matrix button  .The *9 Box Matrix Wizard* opens.

2. Follow the wizard dialogs to select your fields then click **Next** to the *Range Values for plotting employee potential* dialog.

3. Type a numeric (integer) value in the fields currently displaying the default as **1**, **2**, **4**, and **5**. As you modify the range values, the **Range Summary** section changes to reflect your choices.

4. Select the **Ignore values below low value** check box if you don't want to include employees who fall below this value.

5. Select the **Ignore values above high value** check box if you don't want to include employees who fall above this value. Click **Next** to complete the wizard.

Defining 9 Box Performance Field Range Values

Before you can plot employee performance, X-axis (horizontal line) of 3 boxes, in the *9 Box Matrix*, available in OrgPublisher Premier, you must define the low, medium, and high ranges. When you set limits, employees who fall outside the limits are not plotted in the matrix. The medium value is required, but the high and low values are optional.

Note: *Records displayed in the 9 Box Matrix are associated with the level displayed in the Chart View.*

1. Open the *9 Box Matrix Wizard* by selecting **Tools** from the Main menu then **9 Box Matrix Wizard** from the options list. You can also click the 9 Box Matrix button  . The *9 Box Matrix Wizard* opens.
2. Follow the wizard dialogs to select your fields and the potential range values until you reach the *Range Values for plotting employee performance* dialog.
3. Type a numeric (integer) value in the fields currently displaying the default as **1**, **2**, **4**, and **5**. As you modify the range values, the **Range Summary** section changes to reflect your choices.
4. Select the **Ignore values below low value** check box if you don't want to include employees who fall below this value.
5. Select the **Ignore values above high value** check box if you don't want to include employees who fall above this value. Click **Next** to complete the wizard.

Sorting the 9 Box Matrix

When you create a *9 Box Matrix*, available in OrgPublisher Premier, you can choose to sort the data within the matrix boxes.

Note:

1. Open your chart and click the 9 Box Matrix button  .
   The *9 Box Matrix* opens. If no matrix currently exists, the *9 Box Matrix Wizard* opens automatically.
2. If a matrix currently exists, click **Tools** in the Main menu then select **9 Box Matrix Wizard** from the options list to open the wizard.
3. Follow the wizard dialogs to select the fields, limits, and filter options, including **Provide additional customization**, until you reach the *Display information* dialog.

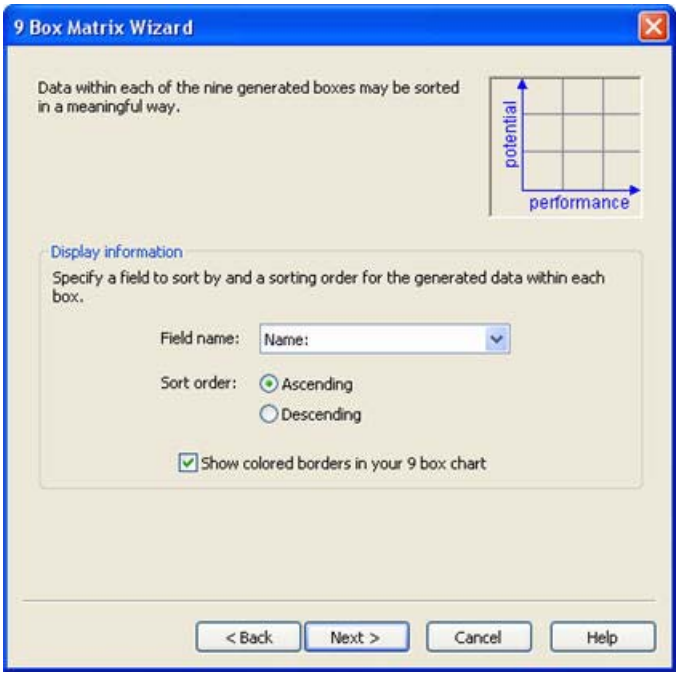

9 Box Matrix Wizard
Data within each of the nine generated boxes may be sorted in a meaningful way.
potential
performance
Display information
Specify a field to sort by and a sorting order for the generated data within each box.
Field name:
Name:
Sort order:
Ascending
Descending
Show colored borders in your 9 box chart
< Back
Next >
Cancel
Help

Figure 13

4. Select the **Field name** you want to sort by in the *9 Box Matrix*.
5. Select the **Sort order**, **Ascending** or **Descending**. Click **Next**.
6. Complete the wizard and click **Finish** to view the matrix.

Selecting 9 Box Filters

When you create a *9 Box Matrix*, available in OrgPublisher Premier, you can select filters to refine your collection of data and personnel.

1. Open your chart and click the 9 Box Matrix button  .
   The *9 Box Matrix* opens. If no matrix currently exists, the *9 Box Matrix Wizard* opens automatically.
2. If a matrix currently exists, click **Tools** in the Main menu then select **9 Box Matrix Wizard** from the options list to open the wizard.
3. Follow the wizard dialogs to select the fields, limits, and sort options, including **Provide additional customization**, until you reach the *Filters* dialog.

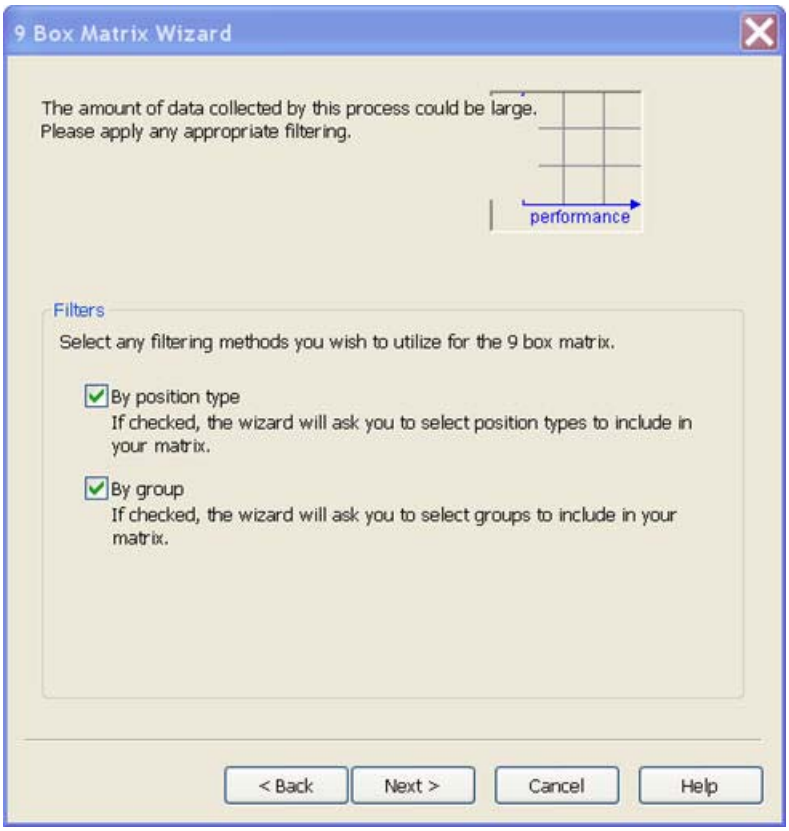

9 Box Matrix Wizard
The amount of data collected by this process could be large.
Please apply any appropriate filtering.
performance
Filters
Select any filtering methods you wish to utilize for the 9 box matrix.
By position type
If checked, the wizard will ask you to select position types to include in your matrix.
By group
If checked, the wizard will ask you to select groups to include in your matrix.
< Back
Next >
Cancel
Help

Figure 14

4. Select the **By position type** check box if you want to select specific position types through which to filter your matrix.

5. Select the **By group** check box if you want to select specific groups through which to filter your matrix. Click **Next**.

6. Complete the wizard and click **Finish** to view the *9 Box Matrix*.

Filtering Position Types in the 9 Box Matrix

When you create a *9 Box Matrix*, available in OrgPublisher Premier, you can use specific position types to filter the potential and performance data.

1. Open your chart and click the 9 Box Matrix button  .
   The *9 Box Matrix* opens. If no matrix currently exists, the *9 Box Matrix Wizard* opens automatically.

2. If a matrix currently exists, click **Tools** in the Main menu then select **9 Box Matrix Wizard** from the options list to open the wizard.

3. Follow the wizard dialogs to select the fields, limits, and filter options, including **By position type**, until you reach the *Filter by position type* dialog.

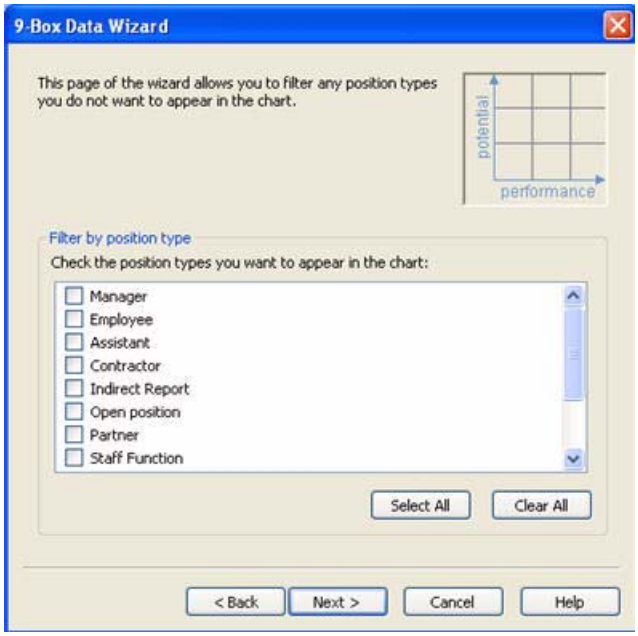


Figure 15

4. Select the position types you want to include in the *9 Box Matrix*. All position types not selected are omitted from the data collection. You also have the option to **Select All** position types or **Clear All** selected position types. Click **Next**.

5. Complete the wizard and click **Finish** to view the *9 Box Matrix*.

Filtering Groups in the 9 Box Matrix

When you create a 9 Box Matrix, available in the OrgPublisher Premier, you can use specific groups to filter the potential and performance data.

1. Open your chart and click the 9 Box Matrix button  .
   The 9 Box Matrix View opens. If no matrix currently exists, the *9 Box Matrix Wizard* opens automatically.

2. If a matrix currently exists, click **Tools** in the Main menu then select **9 Box Data Wizard** from the options list to open the wizard.

3. Follow the wizard dialogs to select the fields, limits, and filter options, including **By group**, until you reach the *Filter by group* dialog.

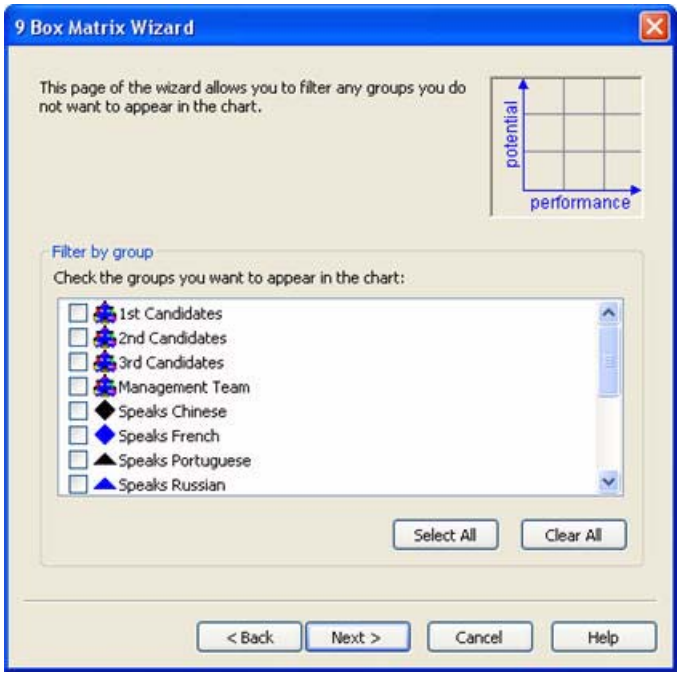


Figure 16

4. Select the groups you want to include in the *9 Box Matrix*. All groups not selected are omitted from data collection. You also have the option to **Select All** groups or **Clear All** selected groups. Click **Next**.

5. Complete the wizard and click **Finish** to view the *9 Box Matrix*.

Printing a 9 Box Matrix

You can print the *9 Box Matrix*, available in OrgPublisher Premier, if the *Print Wizard* has been activated.

1. Open your chart then open the *9 Box Matrix* by selecting **View** in the Main menu then **9 Box Matrix** from the options list. You can also click the 9 Box Matrix button  in the Views toolbar.

2. Click the Print button  in the Main toolbar or select **File**, **Print Options**, and then **9 Box Matrix**. The Print Wizard opens. If the *9 Box Matrix* is maximized, it prints automatically.

3. Select **9 Box Matrix** and click **Next**.

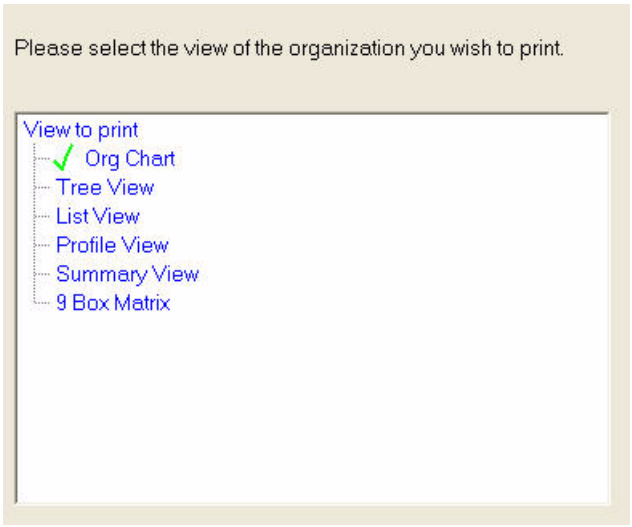


Figure 17

4. Click **Finish** to print the view. The printed *9 Box Matrix* includes the designations for each box, such as **High Performance-High Potential** or **Average Performance-Low Potential**.

Modifying 9 Box Matrix Results

Chart administrators and planners can modify the results displayed within your *9 Box Matrix* (available in OrgPublisher Premier) using the wizard or the **Properties** button in the view.

1. Click **Tools** in the Main menu then **9 Box Matrix Wizard** if you want to modify the selected fields and data ranges.

2. If you want to modify sorting, positions or groups selected, click the **Properties** button at the bottom of the *9 Box Matrix*.

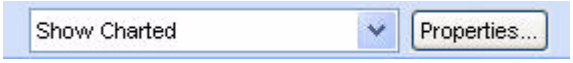


Figure 18

3. The *9 Box Matrix Wizard* opens at the dialog to select a field and sort order. Select the down arrow in the **Field name** and click the field you want to use.

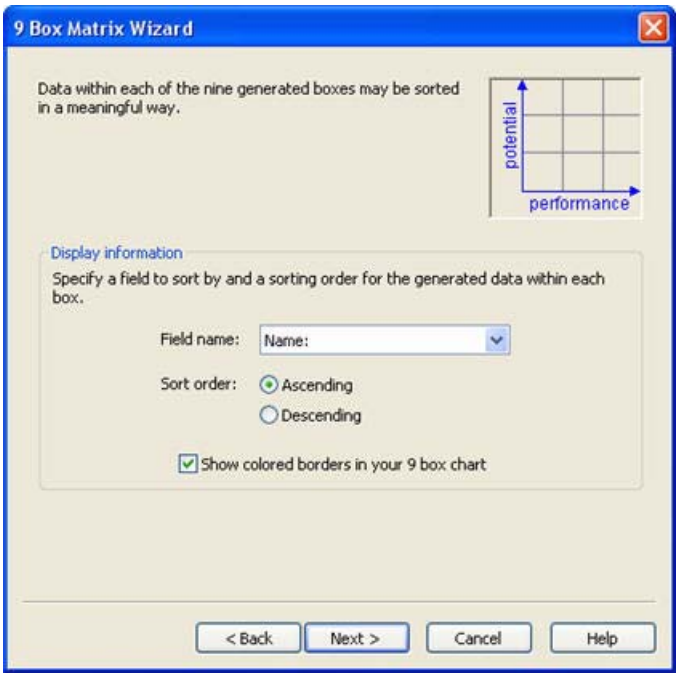

9 Box Matrix Wizard
Data within each of the nine generated boxes may be sorted in a meaningful way.
potential
performance
Display information
Specify a field to sort by and a sorting order for the generated data within each box.
Field name:
Name:
Sort order:
Ascending
Descending
Show colored borders in your 9 box chart
< Back
Next >
Cancel
Help

Figure 19

Any field of data available in the chart can be used for sorting in **Ascending** or **Descending** order.

4. If you selected the **By position type**, this dialog enables you to select the position types you want to include in the matrix. You also have the option to **Select All** or **Clear All**. Click **Next**.

5. If you selected **By group**, the next dialog enables you to select the groups you want to include in the matrix. You also have the option to **Select All** or **Clear All**. Click **Next**.

6. The wizard displays a summary of your *9 Box Matrix* selections. Click **Back** if you want to modify any selections. Click **Finish** to populate and open the matrix.

The 9 Box Matrix  button is also available with pinned profiles to create a matrix.

Creating a Side-by-Side Profile View

Available in OrgPublisher Premier, *Side-by-Side Profile View* allows you to look at multiple profiles at the same time. Each profile contains a pin that "holds the profile" in the view. This feature is available in the application as well as the charts published as PluginX and EChart rich client published with OrgPublisher Premier.

When you have selected the side-by-side profiles you want to use, you can create a new group. You can also pin profiles using *9 Box Matrix* results.

Pinned profiles will be "unpinned" automatically when another style is selected. You must save as a group to save the pinned profiles.

The side-by-side profiles can be printed by selecting the Profile View in the Print Wizard.

Note: *All records in the Profile View, pinned or not, are included when you save profiles as a group.*

1. Open the Profile View. The profile for the top box appears.
2. Select the name, job title, or box title in the chart you want to see in the side-by-side *Profile View*.
3. Click the pin button in the upper right corner to anchor the profile.



Figure 20

The profile is anchored and moved to the right, and a placeholder is created on the left for the next profile. The text changes to indicate the number of pinned profiles.

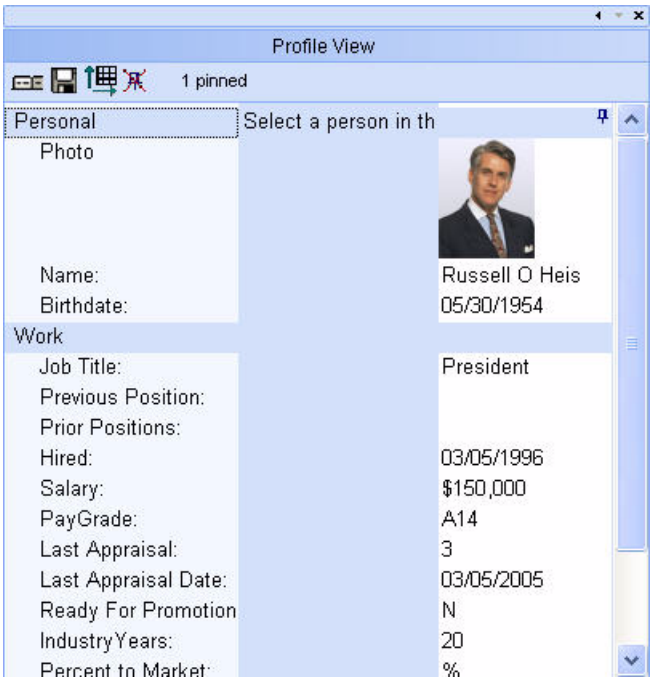


Figure 21

4. Click on another person's name, job title, or box title (depending on the data you are profiling; you want to compare like data fields) to populate the placeholder with the selected person's information.

   If the added profile is pinned, both pinned profiles move to the right, and an additional placeholder appears.

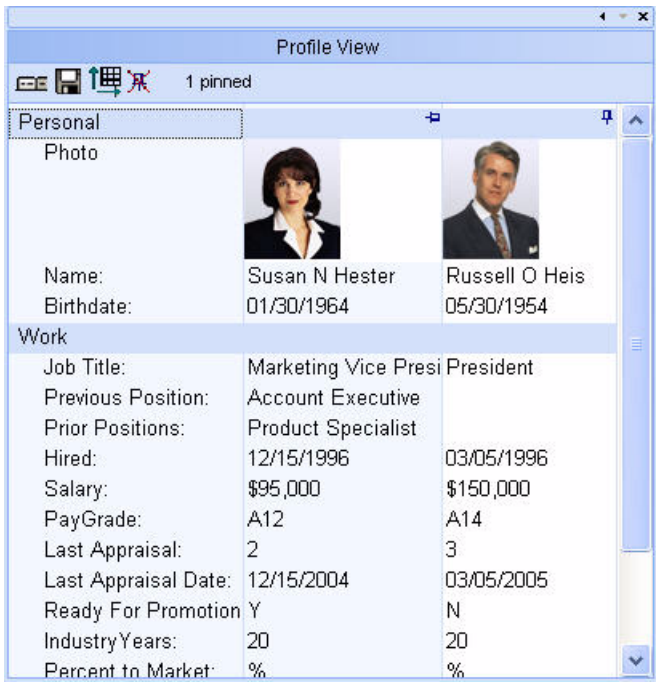


Figure 22



Figure 23

5. Continue selecting and pinning the profiles you want, repeating Steps 2-3.

   You can also include search results in the side by side profile by clicking the Include the search results in Profile View button . Side-by-side profiles are limited to 6 at a time if you auto-pin the profiles in the *Search View*.

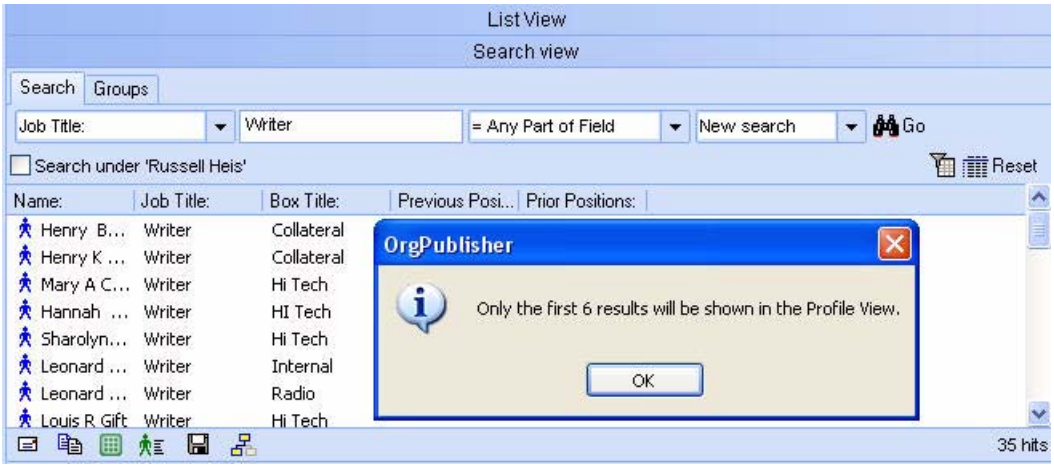


Figure 24

Note: *You can click on "auto-pin" as many times as you'd like to append the next six people into the Profile View along to existing profiles, or you can pin an unlimited number individually.*

Creating a 9 Box Matrix from Pinned Profiles

The 9 Box Matrix button  is also available with pinned profiles in OrgPublisher Premier. The chart administrator sets the values in the *9 Box Matrix Wizard* to display the matrix in a PluginX or EChart rich client chart. Planners are prompted to set their own values within a planning chart.

Note: *You may want to dock the Profile View at the bottom of the chart to better utilize space.*

Displaying a 9 Box Matrix in Side-by-Side Profile View

Results from any box within a *9 Box Matrix*, available in OrgPublisher Premier, can be pinned in the *Side-by-side Profile View*. Pinning provides a side-by-side viewing for data comparison. Only the first 6 records selected are pinned at a time.

Note: *Records displayed in the 9 Box Matrix are associated with the level displayed in the Chart View.*

1. Right-click on a name in the matrix you want to pin in the Profile View. (You can select only one name at a time.)

2. Click **Show in profile view**.

Note: *Names selected in the 9 Box Matrix display in the Profile View only if the names are included in the displayed group and the associated position types are not hidden.*

The selected record displays in the side-by-side profile.

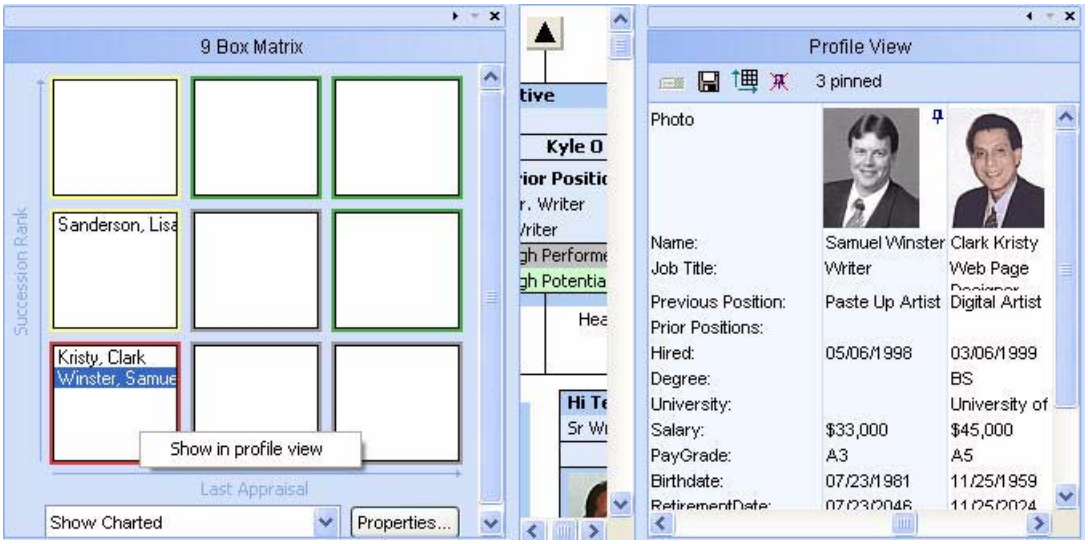


Figure 25

Auto Pinning Group or Search Results as Side-by-Side Profiles

Available in OrgPublisher Premier, you can use new search results or a search result from an existing group to automatically pin profiles (maximum of six records at a time).

Note: *All records in the Profile View, pinned or not, are included when you save profiles as a group.*

1. Conduct your search in the *Search View* or *Search* dialog.
2. Click the **Include the search results in the Profile View** button  . If there are more than six records in the **Search Result** pane, OrgPublisher selects the first six to display in the side-by-side profile.

3. If the search results in less than 6 pinned profiles, you can manually add and pin additional records by selecting a record that matches your original search criteria.

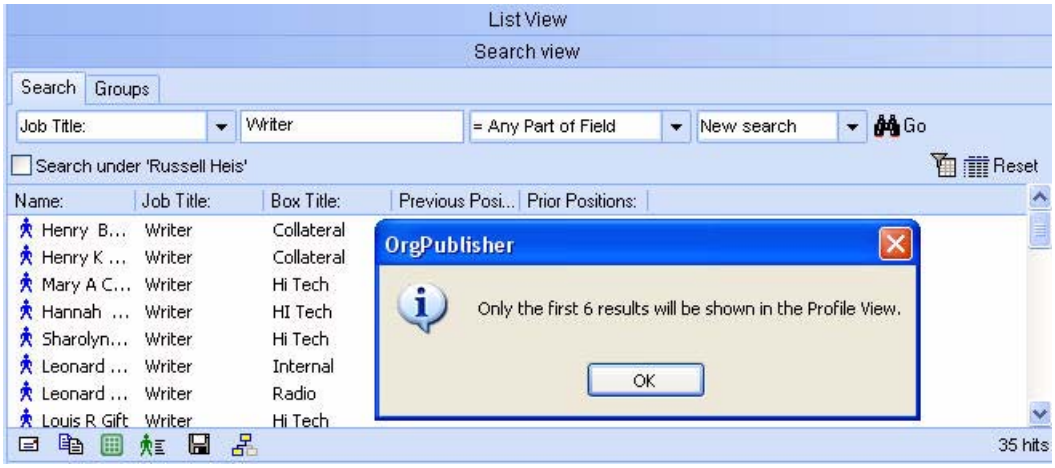
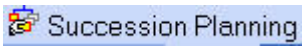


Figure 26

Note: *You can click on "auto-pin" as many times as you'd like to append the next six people into the Profile View along to existing profiles, or you can pin an unlimited number individually.*

Creating a New Succession Planning Chart

If published through OrgPublisher Premier, planning administrators can create a new succession planning chart, modify an existing chart, or delete a planning chart. When in succession planning chart end users can add and remove successors from the chart but cannot change the chart structure.

1. Open the planning-enabled chart in the web browser and click the Succession Planning button 

.

2. Select **Create new succession planning chart**. The *New Succession Planning Chart* dialog opens. If a current succession planning chart does not exist, the dialog opens as soon as you click the button.

   The dialog notes where the planning chart begins, such as "This chart will include boxes from (name) and down." For instance, your chart administrator may publish the chart for you to work from your box down.

Note: *When formatting successor fields, be aware that using lighter colors, such as pale blue or white, may make it difficult to see the text in the chart boxes or views.*

3. Type a name for the chart if you do not want to accept the default.
4. If not already enabled by the chart administrator, you can select the **Password protect this chart** check box to require typing a password whenever the chart is opened.
5. Type the **Password** then **Retype password**.
6. If you want a shortcut to the planning chart to display on your desktop, select the **Create a shortcut to the chart on my Windows desktop** check box.

Note: *When running OrgPublisher Succession planning on Microsoft® Vista with Internet Explorer in **Protected** mode, this check box option does NOT contain the text "on my Windows desktop." Instead, OrgPublisher stores the shortcut at: **%USERPROFILE%\AppData\LocalLow**.*

7. Click **Create and edit chart**. The browser opens the succession planning chart with the Insert toolbar, the Generate a change report  , and email  buttons enabled. See the Generating a Change Report procedure for detailed information.

   The planning chart saves to the folder specified when the original chart was published. PluginX planning charts can be saved to the local hard drive or the web server. See the Storing Planning Charts topic for additional information.

Adding a Succession Candidate to a Box

Available in OrgPublisher Premier, when you create a succession planning chart, the chart opens with no hierarchical information included because this type of chart is meant to help you plan for successors to specific positions within your company.

Note: *When formatting successor fields, be aware that using lighter colors, such as pale blue or white, may make it difficult to see the text in the chart boxes or views.*

- You can add succession candidates by extracting them from a separate data source using the record type of **SC**. The **Box ID** records must match the box IDs of the positions for which they are candidates.

- You can also drag and drop individuals from their current box into the box of the position for which they are candidates. You must then change the position type manually.

Verify that you have satisfied the special considerations when building a succession chart from either a single data field or multiple data feeds.

Note: *It is recommended that you do not combine the Succession planning and OrgPlan features as unexpected results may occur. Succession planning is designed to help you match people to specific positions with no hierarchical information involved. OrgPlan is designed as an organizational modeling tool based on a hierarchy.*

Succession candidates are not included in head counts or summaries.

Exporting Change Data

When you generate change reports you can choose to export data that has changed in order to create a comma separated file reflecting changes to upload into a source HR system. You select the desired fields, and the resulting Microsoft Excel file contains three tabbed worksheets:

- Added position data records
- Removed position data records
- Edited data records (field data modified or movement in the chart)

1. In the planning chart, select **Report** from the menu then **Generate change report** from the options list. You can also click the Generate a change report button  in the toolbar.

   In the OrgPublisher application chart, select **Tools** from the menu then **Compare two charts** from the options list to open the *Compare Charts* dialog. Follow the Comparing Two Charts procedure to generate the report.

   The *Change Report Options* dialog opens.

2. In the **Generate Report** tab, select the report data you want to see then click the **Export Change Data** tab.

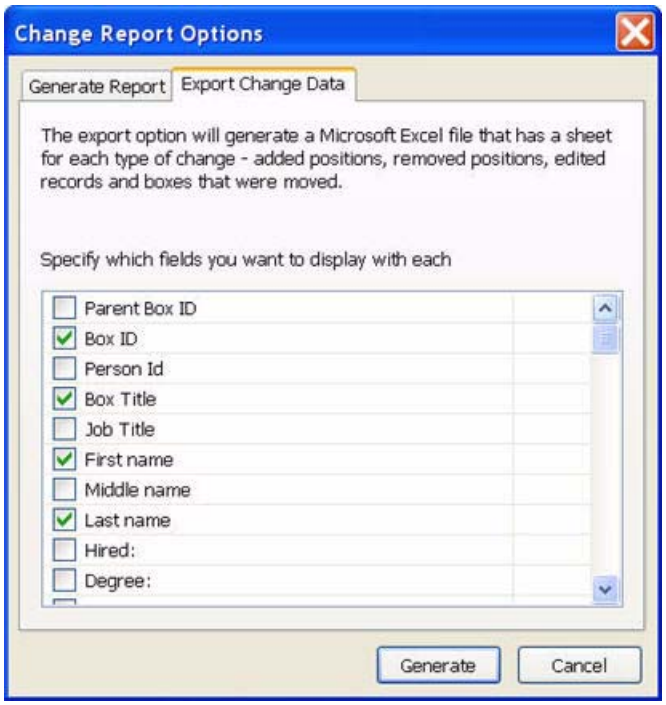

Change Report Options
Generate Report
Export Change Data
The export option will generate a Microsoft Excel file that has a sheet for each type of change - added positions, removed positions, edited records and boxes that were moved.
Specify which fields you want to display with each
Parent Box ID
Box ID
Person Id
Box Title
Job Title
First name
Middle name
Last name
Hired:
Degree:
Generate
Cancel

Figure 27

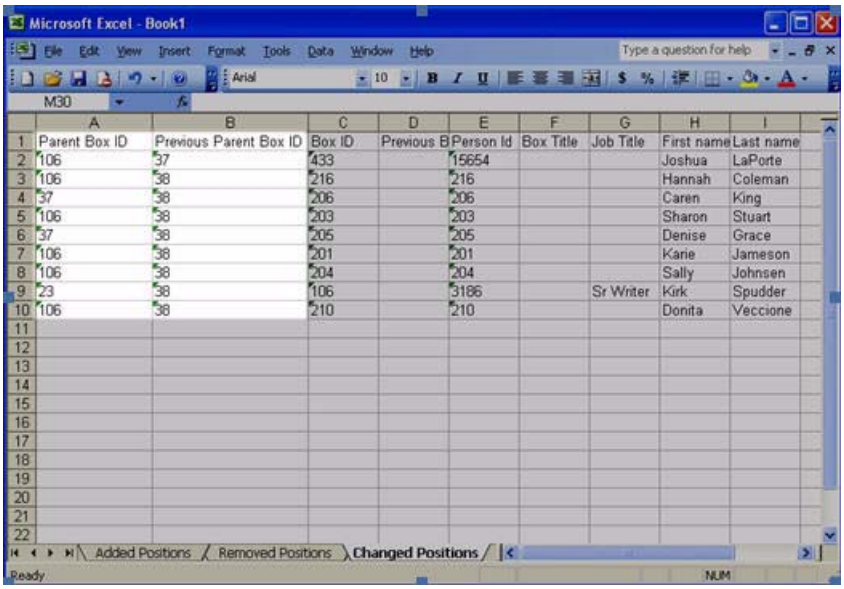
3. Select the fields you want to see in each summary section of the report, such as position types or groups.

Note: *Parent Box ID must be one of the selected fields in order to see the current and previous Parent Box ID data for a changed record.*

4. Click **Generate**. If you selected to **View report in web browser**, the browser displays a basic HTML report that summarizes the changes made in the chart using **Before** and **After** columns, as well as the **Change percent**.

   The HTML file is saved to your local drive in the in the **Local Settings/Temporary** folder. You can also save the report by using the browser **File>Save As** option.

   If you selected **View report in Microsoft Excel**, both the report sheet and export data sheets open with the 3 tabbed sheets.



	A	B	C	D	E	F	G	H	I
1	Parent Box ID	Previous Parent Box ID	Box ID	Previous B	Person Id	Box Title	Job Title	First name	Last name
2	106	37	433		15654			Joshua	LaPorte
3	106	38	216		216			Hannah	Coleman
4	37	38	206		206			Caren	King
5	106	38	203		203			Sharon	Stuart
6	37	38	205		205			Denise	Grace
7	106	38	201		201			Karie	Jameson
8	106	38	204		204			Sally	Johnsen
9	23	38	106		3186		Sr Writer	Kirk	Spudder
10	106	38	210		210			Donita	Veccione

Figure 28

See the Setting Change Report Default Options procedure for more information.

Storing Planning Charts

When you publish a secured EChart using OrgPublisher Premier's organization modeling or succession planning, you can store your planning charts either on the end user's PC or the EChart web server. Planning charts can be shared via email when using the end user PC option. With the server option, each end user automatically has access to planning chart information that exists at or below the user's box in the hierarchy.

Storing the planning charts on the server makes sharing them very easy, but, possibly, makes the information in them highly vulnerable. It is essential that the folder in which they are stored is properly secured.

1. In the planning chart, select **File** from the Main menu then **Preferences** from the options list. The *Preferences* dialog opens.



Figure 29

The dialog displays the default locations set by the IT administrator. If you have the appropriate permissions, you can select to store the planning chart on a local drive or a network location.

2. Type or browse ... to the folder on the server to store planning charts, and verify that the folder is secure - accessible to the EChart sever but **not to HTTP requests**. If you are in doubt about the security, contact your IT administrator.

3. Click **OK** to save the specified folder and return to the planning chart.

Note: *Planners may encounter an error when sending a planning chart created on a local machine using Microsoft Vista. It is recommended that administrators use a secured server location.*

Chart Action Buttons

Enabling Action Buttons

Chart action buttons are an easy way to view and access what were previously the right-click menus for each data field in the Chart View. The chart administrator chooses the Action button options for published charts and can enable or disable the action button feature in the chart.

1. Click **View** in the Main menu.
2. If the **Show Action Buttons** option is not selected, click to enable the feature.

   Click the checked option to disable the feature.

Selecting Chart Action Button Options

As the chart administrator, you can select available Action button options for each data element within the chart box in a published chart. You can remove any or all of the items (eliminating the Action buttons) from the published chart and planning chart.

1. Select **File** from the Main menu then **Publish** from the pull-down menu. You can also click the Publish button 

in the toolbar. The Publishing Wizard or *Publish charts* dialog opens.
2. Step through the wizard dialogs and select the options you want included in this publishing definition.
3. When you reach the dialog for the context menu, click an item to turn it off or on. The default to all options are enabled. A green check indicates an option is enabled, a red X that the option is disabled.

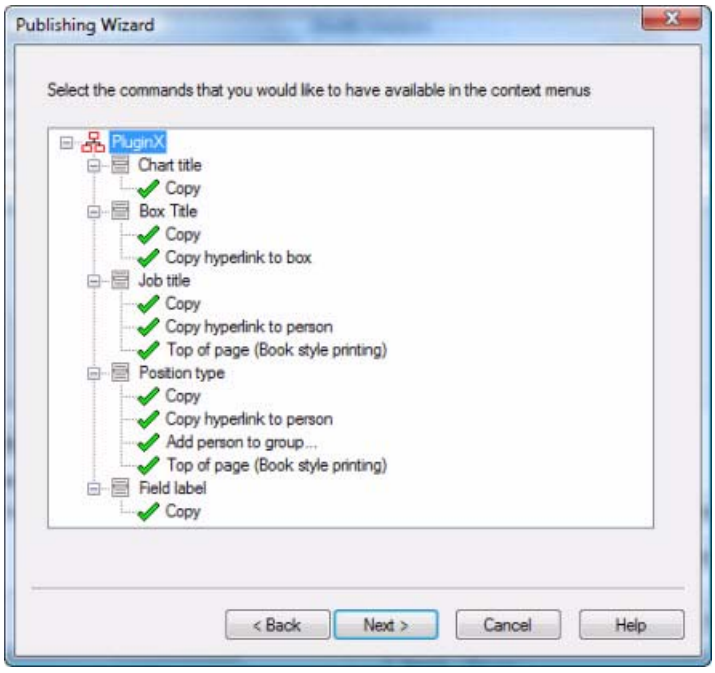


Figure 30

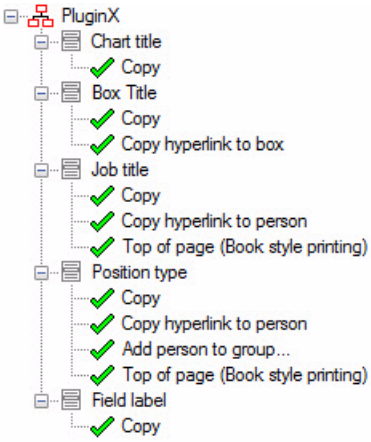


Figure 31

4. Click **Next** to complete the wizard to publish your chart.
   Planning chart options differ slightly but the procedure is the same.

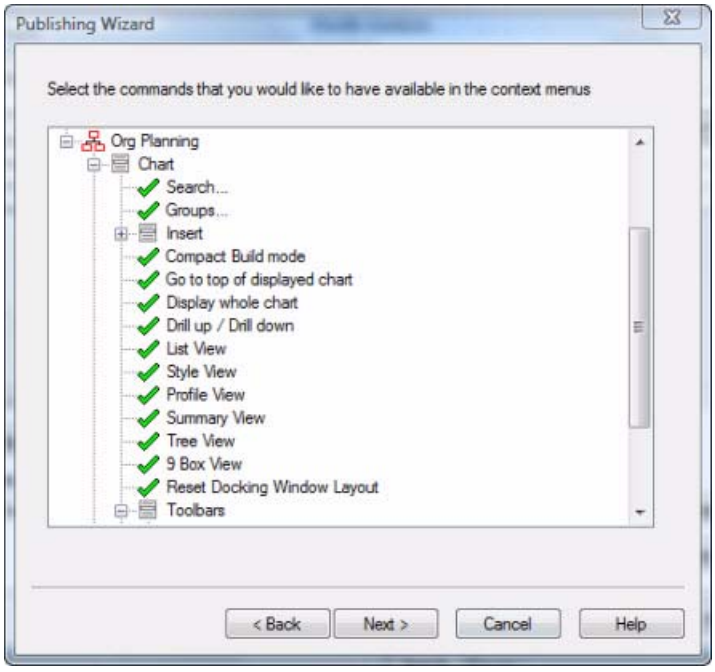


Figure 32

Using Chart Action Buttons

Chart action buttons are an easy way to view and access what were previously the right-click menus for each data field in the Chart View. The chart administrator chooses the Action button options for published charts.

This feature is available in the OrgPublisher application and in charts published as PluginX or EChart rich client, as well as OrgPlan charts.

1. Open the chart and select a data field in a chart box, for instance the job title. The Action button appears to the right of the chart box.

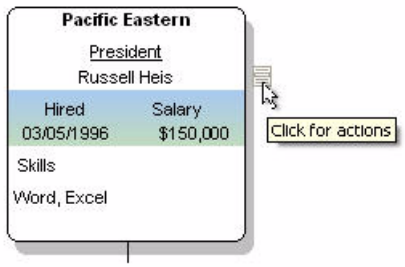


Figure 33

2. Click the button. The available menu options appear.

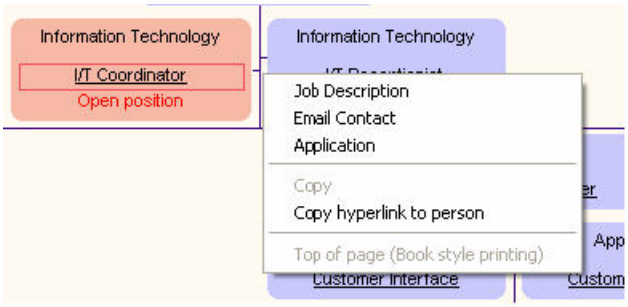


Figure 34

In this example, the data includes Smart Links associated with the data field. Smart Links display at the top of the Action menu list.

Note: *Microsoft® Internet Explorer will append the OrgPublisher menu list with Internet Explorer specific options, such as "Right to left Reading order" or "Insert Unicode control character." These additional menu options cannot be disabled in the browser.*

3. Select the option you want to use and proceed with your task. If you choose not to select a menu option, click in a blank area of the chart to close the menu.

   Chart action buttons include more options when used by the chart administrator within OrgPublisher. The following graphic is of the same box and job title from the chart administrator's perspective.

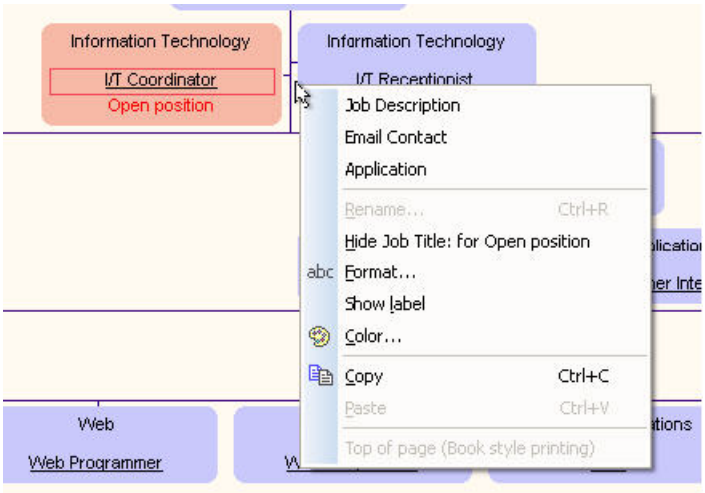

Information Technology
I/T Coordinator
Open position
Information Technology
I/T Receptionist
Job Description
Email Contact
Application
Rename...
Ctrl+R
Hide Job Title: for Open position
Format...
Show label
Color...
Copy
Ctrl+C
Paste
Ctrl+V
Top of page (Book style printing)
Web
Web Programmer

Figure 35

Formatting Charts

Enabling End User Personalization

When publishing in **Advanced Mode**, OrgPublisher 9 allows you to publish a chart as PluginX, EChart rich client, or thin client with an option to remember the user's navigation and interface changes. The same dialog in the Publishing Wizard that provided the **Remember user's place in the chart** now includes this option as **Remember each user's navigation and interface changes**.

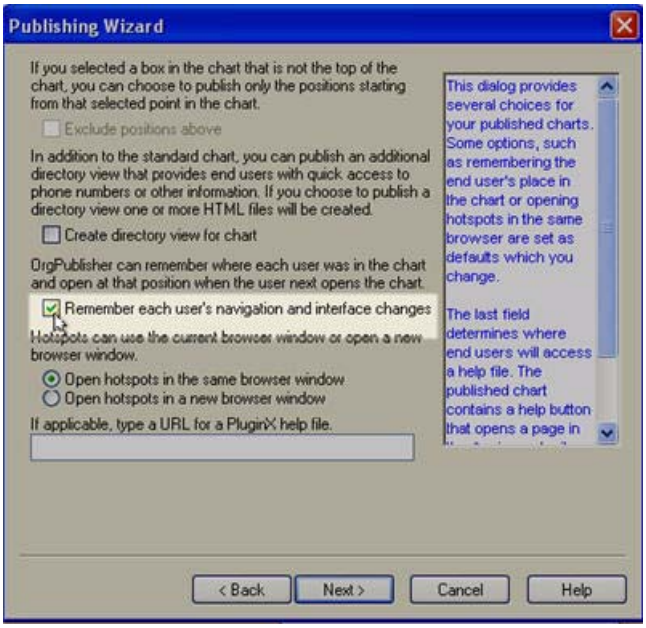

Publishing Wizard
If you selected a box in the chart that is not the top of the chart, you can choose to publish only the positions starting from that selected point in the chart.
Exclude positions above
In addition to the standard chart, you can publish an additional directory view that provides end users with quick access to phone numbers or other information. If you choose to publish a directory view one or more HTML files will be created.
Create directory view for chart
OrgPublisher can remember where each user was in the chart and open at that position when the user next opens the chart.
Remember each user's navigation and interface changes
Hotspots can use the current browser window or open a new browser window.
Open hotspots in the same browser window
Open hotspots in a new browser window
If applicable, type a URL for a PluginX help file.
This dialog provides several choices for your published charts. Some options, such as remembering the end user's place in the chart or opening hotspots in the same browser are set as defaults which you change.
The last field determines where end users will access a help file. The published chart contains a help button that opens a page in
< Back
Next >
Cancel
Help

Figure 36

The settings are saved based on the name of the chart. The end user can save only one group of personalized settings per chart.

End users can reset the settings at any time by clicking the **Reset Style to Published Value** button  . You, as the administrator, can suppress the display of this button when creating the publishing definition using **Advanced Mode**.

Settings that can be remembered are listed below. Items marked as PluginX only are not available in EChart thin client.

- Current style (PluginX only)
- Selected group
- Current top of chart
- Pinned Style View (PluginX only)
- View zoom percentage (PluginX only)
- Levels shown
- Drill Buttons, on or off
- Tree View shown and position (PluginX only)
- *List View* shown and position
- Summary View shown and position
- *Summary View* or **Graphs** tab (PluginX only)
- Profile View shown and position
- List View or **Search View** pane

End users' settings cannot override the normal behavior of the published chart. For instance:

- If the end user has set a specific style as the opening style, but that style is removed by the administrator, when republishing the chart, the defined default style is displayed.
- If the end user has turned on a *Summary View* and you no longer make that view available when you republish the chart, the end user can no longer see that view.
- If the end user has selected a secured style in the personalized settings but you remove that user from the group allowed to view that style, the end user can no longer see the secured style. The defined default style is displayed.
- If the end user tries to open or doc a view that is disabled the view does not open.
- If the end user has personalized the published chart but the administrator subsequently disables personalization, the personalization is ignored until, or unless, the administrator re-enables personalization.

Using Additional Gradient Options

Additional gradient options are available for boxes, background, and legend items.

In the gradient drop down, the black is the background color representation and white is the gradient representation.

1. Select **Format** from the Main menu then **Boxes** from the pull-down menu. The *Format* dialog opens at the **Boxes** tab. You can also use the Format Box button  in the toolbar.
2. Select the specific style you want to modify or, if you want to modify all styles for the chart, select **All Styles**.
3. Click the position type, or **All Position Types**, you want to modify. Only the chart boxes for the selected position types are modified.
4. Click the arrow in the **Gradient Style** field to select one of the new options.



Figure 37

You can also select the **Chart** tab and assign a new gradient style to the chart background, or select the **Gradient style** under the **Formatting** tab of the *Chart Legend Properties* dialog.

Using Dynamic Chart Layouts

OrgPublisher now allows you to dynamically select a chart layout. This feature is available in the application as well as charts published as PluginX and EChart rich client.

1. Open a chart and click the **Select the layout style for this chart** button  .



Figure 38

2. The drop-down list displays layout options. The current layout is selected. Click the layout you want to use.

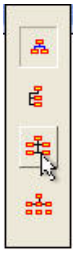


Figure 39

The chart immediately changes the displayed layout.

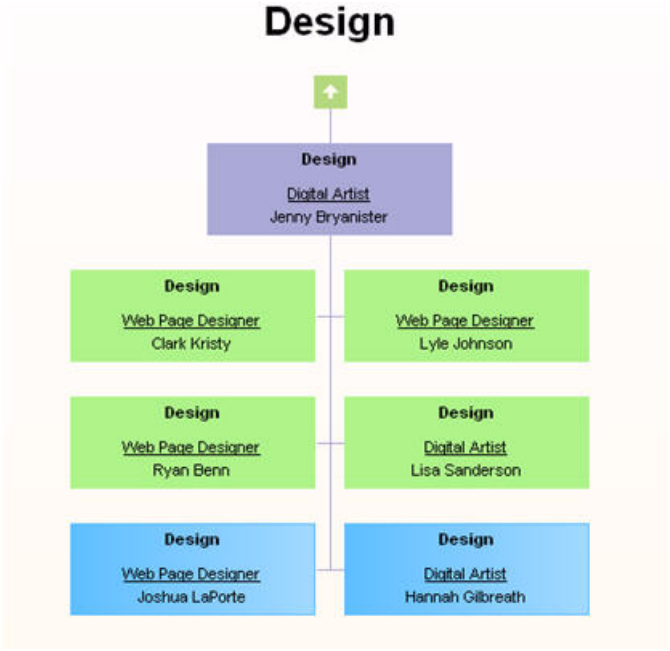

Design
Design
Digital Artist
Jenny Bryanister
Design
Web Page Designer
Clark Kristy
Design
Web Page Designer
Lyle Johnson
Design
Web Page Designer
Ryan Benn
Design
Digital Artist
Lisa Sanderson
Design
Web Page Designer
Joshua LaPorte
Design
Digital Artist
Hannah Gilbreath

Figure 40

Publishing Features

Auto-archiving Charts

With OrgPublisher 9 you can now archive a chart at the same time you publish it.

1. Follow the Publishing Wizard for the PluginX, EChart rich client, or EChart thin client format.

   After you make all your selections in the wizard dialogs, the next to last dialog presents archive options.


Publishing Wizard
OrgPublisher can keep an archive of your chart at the interval you specify. OrgPublisher will store copies of your chart as a historical archive
This feature is extremely useful for tracking changes in an organization. In addition to creating easily viewable chart archives, OrgPublisher can generate change reports that detail differences between 2 charts.
Keep an archive of this chart
Specify the folder where the archives will be stored:
C:\Archives\Charts\
Browse...
Archives will be created on this interval:
Every time the chart is published
Weekly
Monthly

Figure 41

2. Select the **Keep an archive of this chart** check box.
3. Type or **Browse** to the location where you want to store the archives. Chart archive names are generated using the publishing definition name and date.
4. Select the interval at which you want the chart to archive, **Every time the chart is published**, **Weekly**, or **Monthly**.
5. Click **Next** and complete the *Publishing Wizard*.

If position IDs or person IDs are missing, this dialog prompts you to add this information to your data.

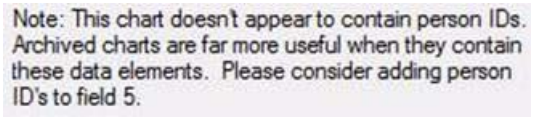

Note: This chart doesn't appear to contain person IDs. Archived charts are far more useful when they contain these data elements. Please consider adding person ID's to field 5.

Figure 42

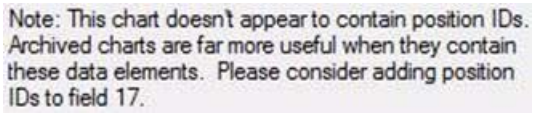

Note: This chart doesn't appear to contain position IDs. Archived charts are far more useful when they contain these data elements. Please consider adding position IDs to field 17.

Figure 43

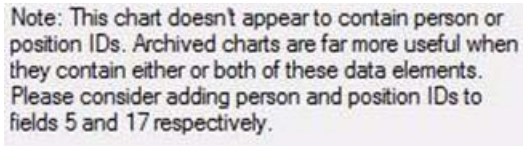

Note: This chart doesn't appear to contain person or position IDs. Archived charts are far more useful when they contain either or both of these data elements. Please consider adding person and position IDs to fields 5 and 17 respectively.

Figure 44

Note: *When archiving from the Publishing Wizard, the OrgHistory definition is not automatically created. If you create a publishing schedule for the chart, the archive is also scheduled.*

Disabling PluginX Screen Capture

When you publish a PluginX chart, the browser print (**ALT+PRNT SCRN**) and copy features are automatically disabled if:

- the chart is **secured** and the PluginX copy option is disabled in the toolbar.
- the chart is **secured** and the PluginX copy option is disabled based on the user's role.

This prevents end users from taking a screen shot or copy of the published chart. When the user exits the web page containing the published chart, the print screen and copy functionality are restored.

This does not, however, eliminate screen captures by users who have Snagit® or other 3rd party screen capture software installed.

If you want to restore the ability to copy the chart in the PluginX browser:

1. Select **File** from the Main menu then **Publish** from the pull-down menu. You can also click the Publish button Publish in the toolbar. The *Publishing Wizard* or *Publish charts* dialog opens.
2. Step through the wizard dialogs and select the options you want included in this publishing definition.
3. When you reach the dialog for enabling toolbar options.
4. Select the **Enable PluginX Copy** check box, located toward the bottom of the dialog.

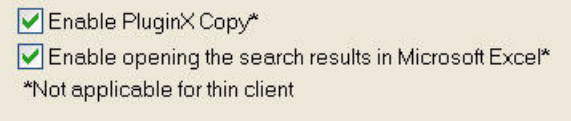


Figure 45

5. Complete the wizard to publish your chart.

Note: *Taking screen captures becomes unavailable system wide only after accessing the published chart. If the you leave Enable PluginX Copy option unchecked in the Publishing Wizard, you can still take the screen capture system wide until you actually open the published chart.*

Publishing in Express Mode

OrgPublisher now provides an **Express Mode** and **Advanced Mode** for publishing. Advanced Mode enables you to choose a publishing format, such as EChart rich client or thin client, as well as select all options prior to publishing. Express Mode prompts you with one screen of options prior to publishing.

Toolbar buttons are limited in charts published through **Express Mode**. Only the List View/Search View and the Profile View are available.

1. Click the Publish button Publish in the toolbar. You can also select **Tools** from the Main menu then **Publishing Wizard** from the options list. If this is the first time you are publishing a chart, the

Publishing Wizard opens. If a publishing definition already exists, the *Publish charts* dialog opens.

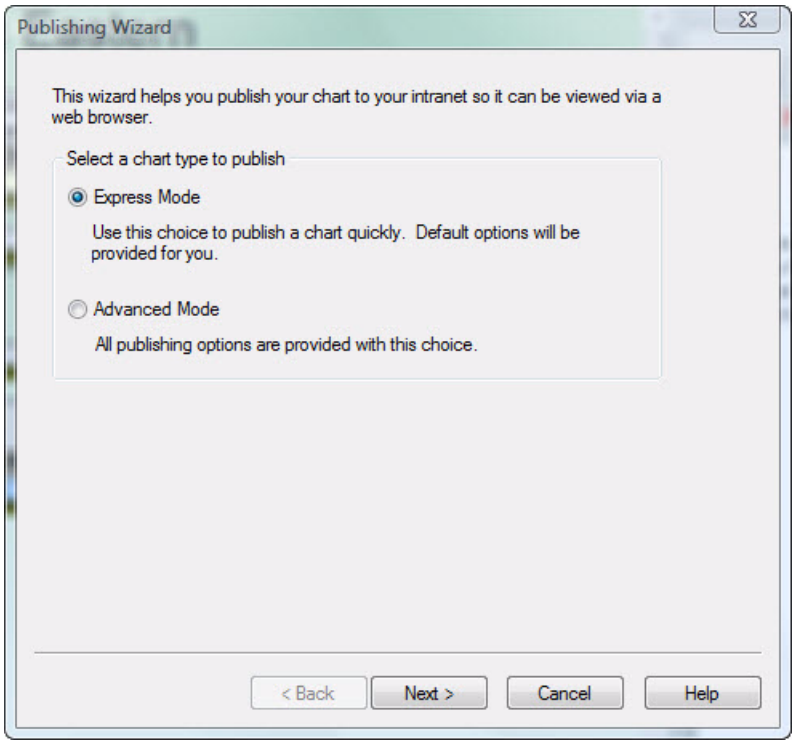

Publishing Wizard
This wizard helps you publish your chart to your intranet so it can be viewed via a web browser.
Select a chart type to publish
Express Mode
Use this choice to publish a chart quickly. Default options will be provided for you.
Advanced Mode
All publishing options are provided with this choice.
< Back
Next >
Cancel
Help

Figure 46

2. If the *Publishing Wizard* opens, select the **Express Mode** radio button. If the publish chart dialog opens, click **New** to open the *Publishing Wizard* then select **Express Mode**. Click **Next**.

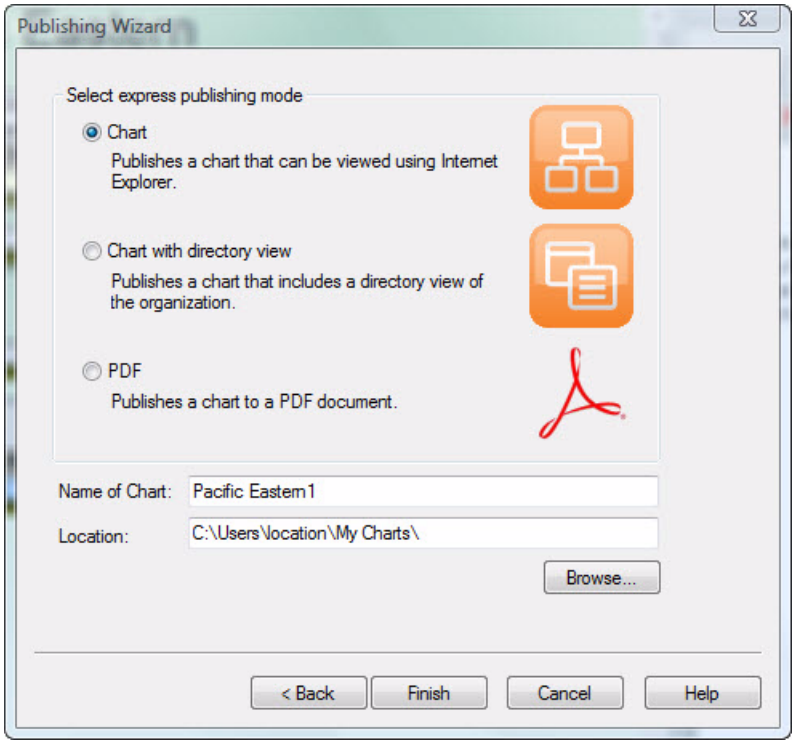


Figure 47

3. Select the type of express publishing you want. Options include:

Publishing Options	Description
Chart	Publishes a chart that can be viewed with Internet Explorer. (PluginX)
Chart with directory	Publishes a chart that includes a directory view of the organization. (telephone list)
PDF	Publishes a chart to a PDF document.

4. Accept the default or type the **Name of Chart**. The name can be the same as the chart name and does not need to include publishing information. The name must, however, be unique and cannot contain any special characters such as slashes (**** or **/**), colons (**:**), asterisks (*****), question marks (**?**), quotation marks (**"**), and greater than or less than symbols (**<** or **>**). The publishing definition name can be up to 255 characters.

Note: *OrgPublisher checks for invalid characters in this step and when you click Finish. Invalid characters are replaced with a dash (-). A message displays at the end of the wizard, and you can change the chart name to avoid the dashes.*

5. Accept the default **Location** or **Browse** to the location to save your chart file.

6. Click **Finish**. The *Publishing Summary* message displays the link, or links if you also chose to publish a **Chart with directory**, to your published charts. Click on the link to preview the chart.

Publishing a Chart for Succession Planning

At chart publishing time, the chart administrator can choose to enable one or both of the planning options available in OrgPublisher Premier. Once selected, the chart administrator is taken through the wizard dialogs for planning charts.

1. Click the Publish button 

in the toolbar or the Publishing Wizard button  in the Wizard View. You can also select **Tools** from the Main menu then **Publishing Wizard** from the options list. The Publishing Wizard opens.

2. Select **Advanced Mode** and follow the wizard dialogs, selecting the **Interactive Org Chart** option then either the **PluginX** or **EChart Rich client** format.

3. In the *OrgPlan* dialog, select the **Enable Succession Planning** check box. Click **Next**.

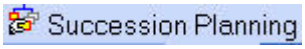
4. If you want the succession planning chart to record the Windows NT user sign-on ID and a comment, if supplied, for each change, click the **Enable revision history** check box.

5. If you want succession planning charts password protected, click the **Require that all planning charts be password protected** check box.

6. If you want an indicator in the chart where changes have been made, select the **Show visual indicator for changes** check box.

7. If you want to select the defaults for the planning change report, click **Set default options for change report** to open the Change Report Options dialog. See the Setting Change Report Default

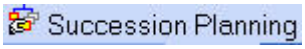
Options procedure in this document for detailed information. Click Next

8. Select the context menu commands you want to make available in both the planning-enabled PluginX and planning charts by expanding each menu and selecting the options you want.
9. Click **Next** and continue with the publishing procedure.
10. When the chart is published, succession planning administrators click the Succession Planning button 

in the toolbar. The *Succession Planning Charts* dialog opens.
11. To create a new chart, select **New**. See the Creating a New Succession Planning Chart procedure for more detailed information.

When the chart is published, the planning administrator sees one of the following button options, based on the chart administrator's selection.

- Organizational Planning only is available - 

- Succession Planning only is available - 

- Organizational and Succession Planning are available - 

- the Planning button options list displays when the button is clicked.

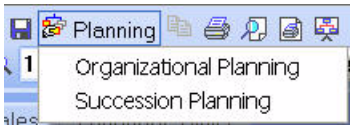


Figure 48

Selecting Role-based Toolbars

If you publish an EChart rich client, you can secure role-based toolbar buttons based on groups.

Note: *If your chart contains only one group, the lock icons are disabled.*

1. Create any groups needed to secure toolbar buttons.

2. Create a publishing definition for an EChart rich client after selecting the **Advanced Mode** option in the *Publishing Wizard*.

3. When you reach the toolbar button selection dialog, open locks appear to the left of each securable button.

4. Click on the lock to display security options.


Publishing Wizard
Select the toolbars and buttons you want enabled.
Style selector
Status bar
Main toolbar
Save as
Copy*
Go to top*
Search
Toolbar search*
Zoom to point*
Zoom factor*
PowerPoint*
Print
Print preview*
Button is not secured. Click to assign to a group
Display whole chart
Drilling on/off
Displayed levels
Large About box button
Reset Style
Chart Layout*
Views toolbar
Style view
Tree view*
List view/Search view
Profile view
Summary view
9-Box view
Enable PluginX Copy*
Enable opening the search results in Microsoft Excel*
*Not applicable for thin client
You can select which buttons and toolbars to enable in the published chart. The items noted with an asterisk (* are in EChart thin client charts.
The Views toolbar provides the most flexibility to end users. PluginX Copy affects right-click menus and Copy buttons in the Chart, List, and Search Views. If you disable the PluginX Copy option, the Copy button in the toolbar is, in effect, also disabled.
< Back
Next >
Cancel
Help

Figure 49

5. Right-click on the lock to display the available groups. Click to select individual groups or click **(Select all groups)** to include all group results.

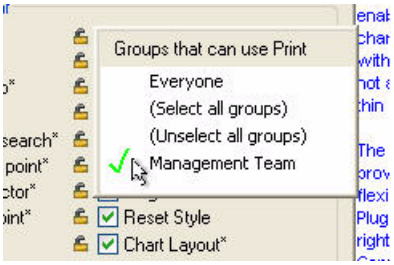


Figure 50

6. After selection, the lock appears closed and the button displays a green filled check box indicating that it is available for the restricted viewing audience.

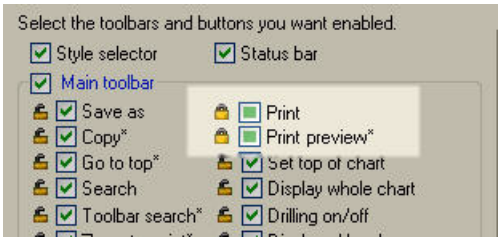


Figure 51

Only users who are in the selected groups have access to the locked buttons when they access the published EChart.

Security Features

Setting Field Security Based on Group Membership

An additional layer of security restricts the display of data unless the record is a member of a specific group. The chart administrator can now display data for select employees based on search criteria and group membership. This allows end users to see results for employees across the whole chart – not just within the span of control in which they are a member.

You may want to use this feature to:

- display fields for employees who are at a specific performance level, specific age, etc.
- restrict specific fields to only display if the logged in individual supports that employee, and you are using the same data feed to create individual charts for each member of your HR team.

1. Create a group containing the employee records you want to view.
2. Open the *Custom Fields Properties* dialog and select the field to secure.
3. Click the Security button 

to open the *Custom Field Security* dialog.
4. Setup up the desired security attributes:
   – Will the field be searchable?
   – Can the end user see the data for the entire chart, their own box and subordinates, or subordinates only?
   – Can everyone see the field or just a select group of individuals?
5. Select the group where the field will display (highlighted area in the following graphic).


Custom Field Security
Allow this field to be searchable in the search view and the search dialog. Making a field non-searchable does not hide the field in the chart and other views.
Options for secure ECharts
Fields can be secured based on the user's place in the hierarchy. This field should be viewable in:
Entire chart
User's box and subordinates
User's subordinates only
Fields can be secured based on a group that the user belongs to. This field should be viewable only by users who are in this group:
HR Specialists
Fields can be secured so that they're only visible in the records of members of a certain group:
Below Average Performers
Note: Fields will be visible only when all of the above criteria are satisfied. For example if a field is set to display for the user's subordinates and group 'x', the field will only be visible in subordinate boxes of users who are in group 'x'.
OK
Cancel

Figure 52

If the end user can see all records in the chart, the secured field data displays for the group identified in Step 5. If the end user can only see within their designated span of control, they see the secured field data only within that span of control.

Unpublished Chart



Figure 53

Published Chart – HR Specialist logged in and viewing sensitive data for their area of responsibility



Figure 54

Published Chart – Viewer logged in and viewing sensitive data for below average performers

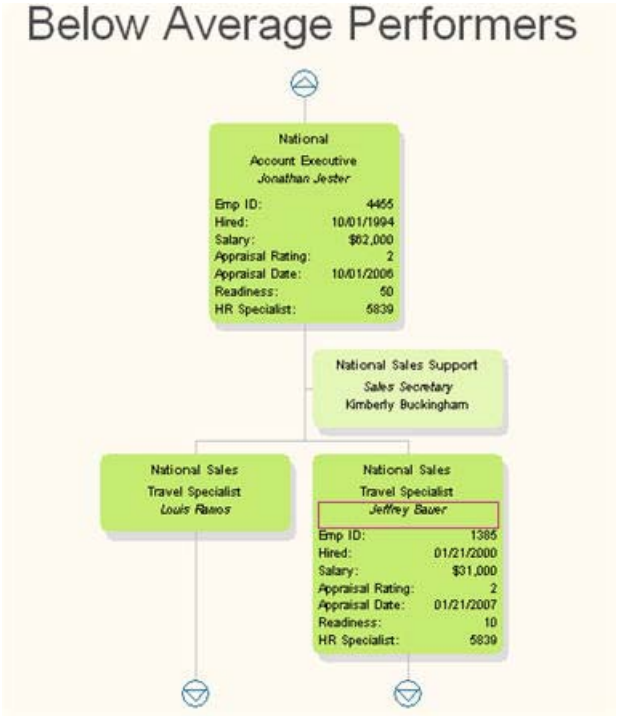


Figure 55

Toolbar Features

Using Enhanced Toolbar Search and Find Features

The simple toolbar search feature in the OrgPublisher application and published chart has been modified.

1. The Find Next toolbar field is now labeled **Look For**. You can type in a single or multiple words.



Figure 56

2. Click Go to begin the search navigate around the chart: searches on a box-to-box basis for the next instance of a matching record.



Figure 57

3. To reuse previous searches, click on the down-arrow and select the search item you want. To clear the search list, right-click on the button and select **Clear List**.

Sending Feedback to Aquire

You can easily send feedback to Aquire via the Help menu.

1. Click **Help** in the Main menu, and then click **Send Feedback to Aquire**.

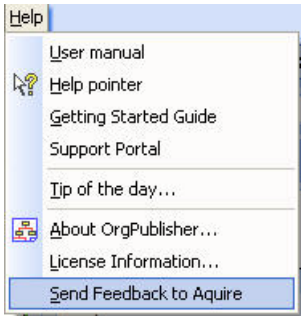


Figure 58

Your email client launches with the OrgPublisher version information in the subject line.

2. The email is addressed to **feedback@aquire.com**. Type your message and click **Send**.

   Your email message will be reviewed and steps taken accordingly by an Aquire employee.

Using Click and Drag Scrolling

When the mouse cursor sits over a blank area in the Chart View, the cursor changes to a hand icon  . Using the click and drag scrolling feature is another way to navigate through a large chart. This option is always enabled and cannot be turned off.

- Click and hold down the mouse button. The hand closes  and allows you to scroll through the chart levels by dragging or moving the mouse wheel in the direction you want the *Chart View* to move.

  For instance, if you want to see the bottom of a chart level, you want the *Chart View* to move up. Click the hand in the background of the view and drag upwards.

OrgPublisher 9 Scrolling Enhancement

Chart scrolling is now updated with more of an iPod® scrolling feel. As you drag to move a chart, it will appear more as a “toss.” As you release the mouse, the chart continues to move with a gradual slow down to it’s new position.

Views and Dialogs

Enabling or Disabling Styles Tabs

The tabbed styles option is the default selection in OrgPublisher. You can turn this option off or back on.

1. Right-click on the Styles bar in OrgPublisher. An options list appears.
2. Select the **Show styles in tabs** option to disable the tabbed styles. To enable the tabbed option again, repeat Steps 1-2.

Maximizing Docked Views

The views that are normally docked by default, Summary View, Tree View, List View, Profile View, and 9 Box Matrix Wizard (available in OrgPublisher Premier) – can now be maximized to fill the OrgPublisher window. You no longer have to display the Chart View.

This feature provides a method to create a “dashboard” style with workforce analytics available for your management team, and is available in the application as well as charts published as PluginX and EChart rich client.

Note: *You can drag and drop a docked view to another side of the OrgPublisher window, right, left, top, or bottom.*

When views are maximized, toolbar buttons not usable with the view are disabled (grayed out). Views can be maximized if they are docked on the right or left side of the OrgPublisher window.

In the example below, the *Profile View*, *Summary View*, and *Search View* are shown. The *Summary View* is maximized while the *Profile View* and *Search View* are not. If a view is not maximized, it can be sized by dragging the left or right border of the view.



Figure 59

Maximizing a View

1. Open the view you want to maximize.



Figure 60

2. Click the Maximize button . The view increases in size to fill the screen.



Figure 61

3. Click the Restore button to set the view to its previous size. You can also lose the view and re-open it to reset the size.

Opening Multiple Views

1. Open all views you want to display in OrgPublisher. If you want to create a dashboard, first create a new style then begin opening the desired views.

2. Dock the views and size them as needed.

3. Maximize the primary view.

Note: *Only one docked view can be maximized at a time. If a second view is maximized the first view returns to its original size.*

4. If the *Graph View* is active and you click on an individual's name in the List View or Tree View, the graph may change based on the number of levels displayed in the underlying chart. In this example, 2 levels are shown. When Gregory O'Malley is selected, Gregory is on the 2nd level of the displayed chart. The graph now reflects the current top of chart, Greg's Manager.

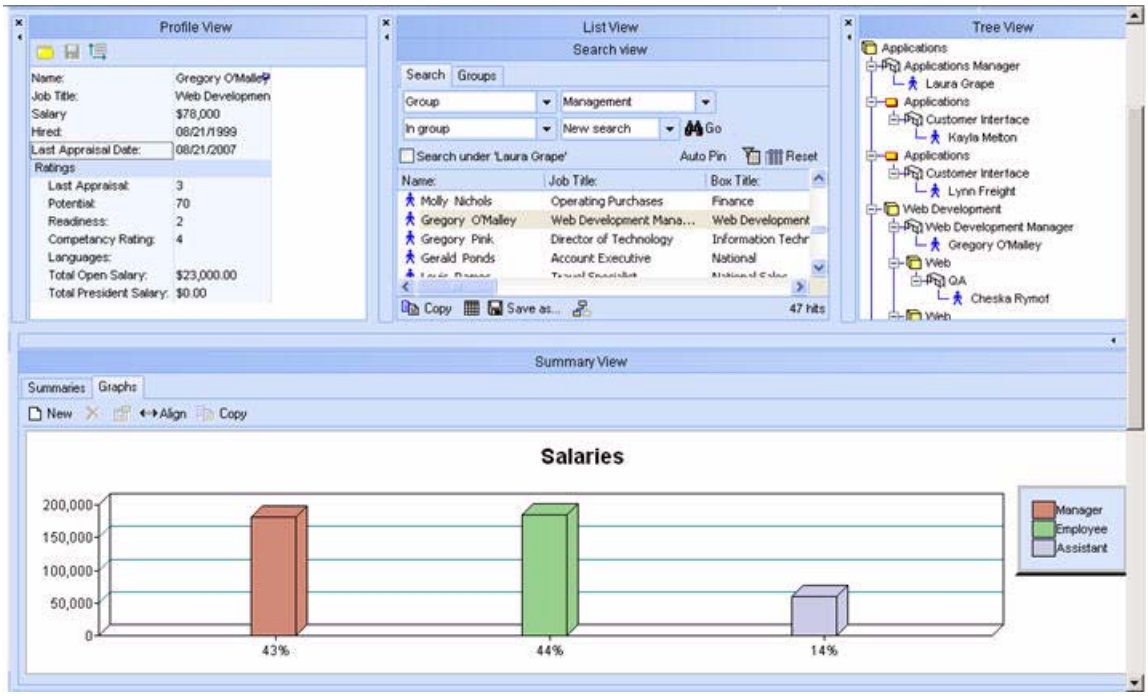


Figure 62

Resetting Maximized or Docked Views

The views normally docked by default are *Summary View*, *Tree View*, *List View*, *Profile View*, and 9 Box Matrix View. These view can also be maximized to fill the OrgPublisher window. If you no longer need the maximized view or if, over time, you see inconsistencies in the docked views, you can reset the chart to the original state.

There are three methods to reset maximized views.

- Click the Restore docked window (Contract docked window if the views are docked at the top or bottom of the *Chart View*) button at the top of the view.
- Select **View** from the Main menu then **Reset Docking Window Layout** from the pull-down list.
- When the **Chart View** is open, you can right-click in an open space to see a list of menu options. Click **Reset Docking Window Layout**.

- In the published PluginX chart, click the Reset style to published value button in the Views toolbar.

Troubleshooting Maximized/Docked Views

When working with several views, docking them, maximizing, and moving, you may experience problems. Close all docked views and the reopen each view you want to use. Follow the instruction above to **Reset Docking Window Layout**. This sets the views back to a place where you can restart the docking or maximizing of views you want.

Resizing Dialogs

Dialogs that require a scroll bar to view all available options can be resized to increase height and width. You cannot resize a maximized view.

1. Open a dialog that requires a vertical or horizontal scroll bar to view all fields, such as the Format dialog, **Chart** tab.
2. Place the mouse pointer on the corner or border of the dialog that contains ; in this example, the bottom-left border. Hold the left mouse button down and drag to increase the height.

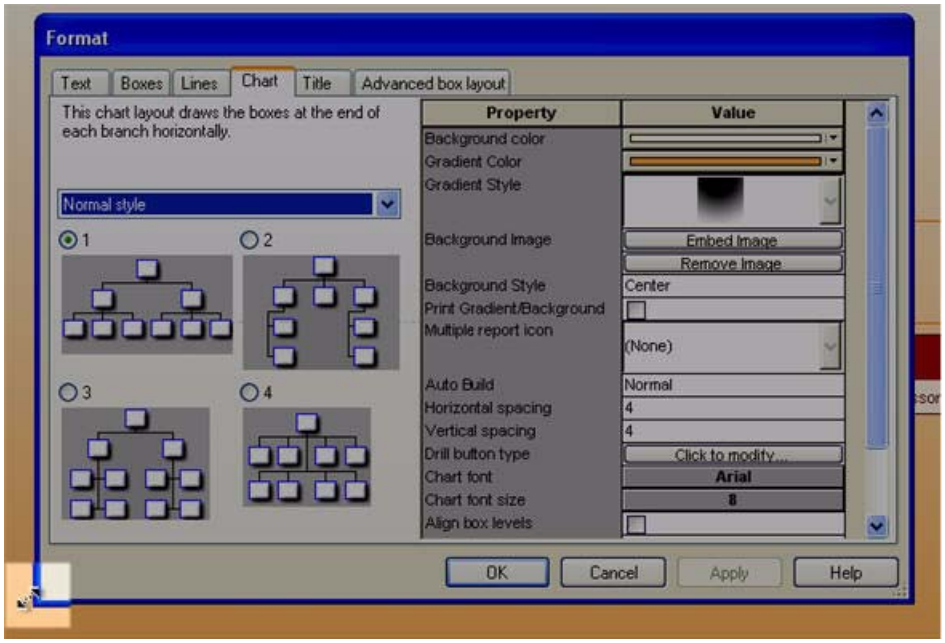


Figure 63

Viewing the Tabbed Profile

If you have created subheadings in the Profile View you, as well as the end user of a published chart, have the option to display the information with tabs representing each subheading. The chart administrator sets the default display for the published chart.

1. Open the *Profile View* and add subheadings if they do not currently exist.



Figure 64

2. Right-click inside the view and select **Configure Profile View**. The *Configure Profile View* dialog opens.



Figure 65

3. Select the **Show headings as tabs** radio button.
4. Click **OK**. The dialog closes and the *Profile View* displays the subheadings as tab options.



Figure 66

5. Select a tab to view the subheading and associated data.

6. Click the Enable/disable tabbed category view button to remove tabs and view the grid.

The *Hover Profile* can also be configured to display tabs.

Viewing the Tabbed Hover Profile

If you have created subheadings in the *Hover Profile View* you, as well as the end user of a published chart, have the option to display the information with tabs representing each subheading. The chart administrator sets the default display for the published chart.

1. Open the *Hover Profile* and add subheadings if they do not currently exist.

2. Right-click inside the view and select **Configure Profile View**. The *Configure Profile View* dialog opens.

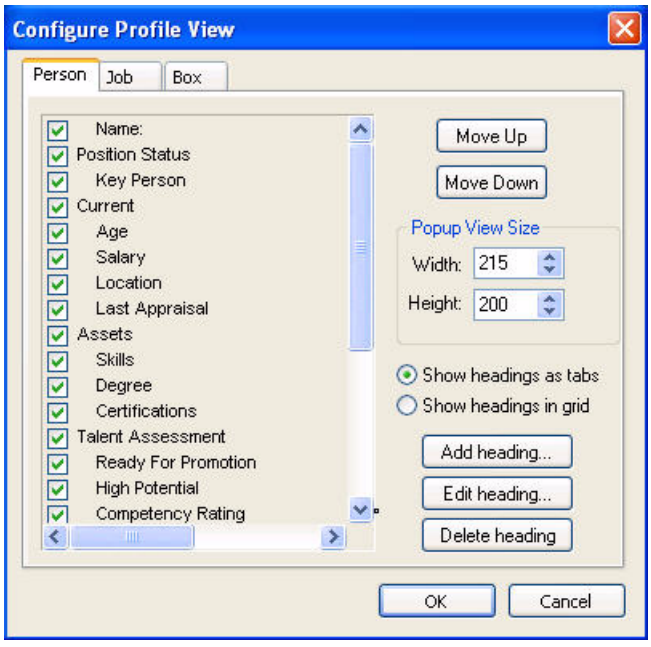


Figure 67

3. Select the **Show headings as tabs** radio button.

4. Click **OK**. The dialog closes and the *Hover Profile* displays the subheadings as tab options.

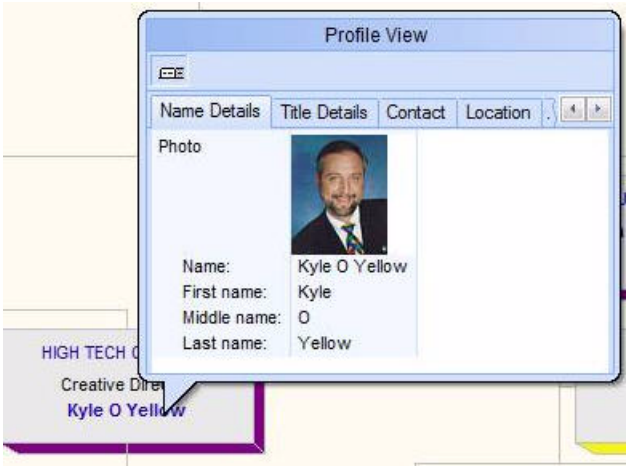


Figure 68

5. Select a tab to view the subheading and associated data.

6. Click the Enable/disable tabbed category view button to remove tabs and view the grid.

The *Profile View* can also be configured to display tabs.

Using the Tabbed Style Selector

In addition to selecting a style from the Style View, OrgPublisher now displays available styles with tabs across the Style bar. The last tab in the application contains a New Style button which launches the *Style Wizard* when selected. The tabs display in alphabetical order.

Click on a tab to look at the selected style.

The application tabs look like this:



Figure 69

The published chart tabs look like this:



Figure 70

Note: *The edit style bar label option is not available if the Show styles in tabs option is enabled.*

Workforce Analysis Graphs

Note: *Workforce Analysis Graph data changes based on where you are in the chart, just as the Summary View data changes.*

Creating Workforce Analysis Graphs

Workforce Analysis Graphs use Summary View data to create graphs visually depicting your organization. There are 3 graph options: pie chart graph, horizontal bar chart graph, and vertical bar chart graph. Just as *Summary View* data changes as you drill through the chart levels, graph results also change.

Note: *When using percentages in Workforce Analysis Graphs, OrgPublisher displays percentages with 2 decimal places.*

Graphs are displayed in published PluginX charts and EChart rich client and thin client. Thin client charts display the graphs as GIF format below the *Summary View*. Graph properties are not changeable in published charts, but may be copied to the clipboard. Graphs do not display when publishing as PDF, HTML or when sending output to PowerPoint.

Note: *Graph categories with a zero value do not appear in the graph.*

1. Open the *Summary View*.
2. Select the **Graphs** tab.
3. Maximize the docked window.
4. Click **New** to open the *Graph Properties* dialog.
5. Modify the properties for your graph.

Property	Description
Graph Title	Type the text you want to display above the graph.
Graph Labels section	
Show Categories	Select this option to display the position type or group name for each chart element.
Show Percentages	Select this option to display the percentage each chart element represents compared to the whole.
Show Numbers	Select this option to display the actual count for each chart element.
Other Category section	

Property	Description
Category Name	Accept the default "Other" or type a different label. This label must contain at least 1 character.
Maximum Categories	Select the maximum number of elements from the Summary View you want to display. This number can be between **1** and **12**. The default is **5**. The **Other** category plus the independent elements equal the 12 elements allowed from the *Summary View*.
Minimum Percentage	Select the minimum percentage required for an independent element to display in the graph. Any element that falls below the percentage is accumulated in an **Other** category in the graph. The default is off.
Size	
Width	Increase or decrease the width of the graph. The maximum value is **3000** and the minimum value is **100**. When there are multiple graphs aligned vertically, all graphs are automatically resized to match the widest and tallest graph.
Height	Increase or decrease the height of the graph. The maximum value is **3000** and the minimum value is **100**.
Summary Column	Select a summary option available in the Summary View. This is the column used for charting and is the number displayed when **Show Numbers** is selected. The default is the first column in the *Summary View*.
Select Categories	Click this button to open the *Select Categories* dialog. Select categories from a list of all items in the *Summary View*. At least 1 category, and no more than 12, must be selected. Click **OK**.
Select Colors	Click this button to open the *Select Colors* dialog. Choose a color for each category displayed in the graph. Click **OK**.
Show Legend	When this check box is selected a legend displays for the graph. The default is selected.
Legend Options	This option is enabled when **Show Legend** is selected. Click this button to open the *Legend Options* dialog. Select background color, a border around the legend, font, and placement of the legend within the graph area. Click **OK**.
Zoom to Fit	If only one graph exists, select this check box to expand or shrink the graph to fill the entire graph area. If there are multiple graphs, the graph expands horizontally when the graphs are vertically aligned, and expands vertically when they are horizontally aligned. If this option is selected, you cannot resize the graph by dragging the borders.

Property	Description
Graph Appearance section	
Type	Select the type of graph you want to display. The default is a pie chart graph. When a horizontal or vertical bar graph is selected, the **Bar Graph Options** button is enabled. Click to open the *Bar Graph Options* dialog and modify the display of the bar chart. You can display background lines and data axis values. The maximum value displayed on the data axis is determined by adding 5% to the category with the highest value. An adjustment is made to the value to provide open space between the highest value and the end of the graph.
2D	Select this radio button to display the pie chart or bar graph in standard two dimensions.
3D	Select this radio button to display the pie chart and bar graphs in three dimensions.
Bar Graph Options	Available for bar graphs only. you can select to **Display Background Lines**, **Display Data Axis Values**; and select the **Width of Bars** and the **X-axis Label Angle**.
Preview	This area displays a sample graph with currently selected options. All graph attributes may not be shown in this view.

6. Click **OK** to close the dialog and display the graph.

You can print graphs when the Print Wizard is enabled. To print a graph, open the *Summary View* and select the *Graph View*. Each graph prints one to a page.

Resizing Workforce Analysis Graphs

Graphs may be made narrower or wider by changing the width in the *Graph Properties* dialog or by using the Align button 

in the **Graphs** tab.

Resizing Graphs using the Graph Properties Dialog

1. Open the *Summary View* and select the **Graphs** tab.

2. Click the Edit properties button  to open the *Graph Properties* dialog.

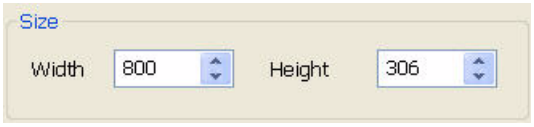


Figure 71

3. Change the **Width** and **Height** by using the arrows up or down.
4. Click **OK** to close the dialog and resize the graph.

Resizing Graphs Using Alignment Buttons

1. Open the *Summary View* and select the **Graphs** tab.
2. The Align button 

in the **Graphs** tab toolbar toggles between horizontal and vertical alignment. Click the horizontal button if you want to change the width of the graph. When you click this button, it toggles to the vertical button.
3. Drag the right border of the graph to the width you want.
4. Click the vertical button 

if you want to change the height of the graph. When you click this button, it toggles to the horizontal button.
5. Drag the bottom border of the graph to the height you want.
6. Save the chart when you have finalized the size of the graph.

Selecting Graph Categories

When you create a workforce analysis graph, you must select the categories to show in that graph.

1. Open the Summary View and select the **Graphs** tab.

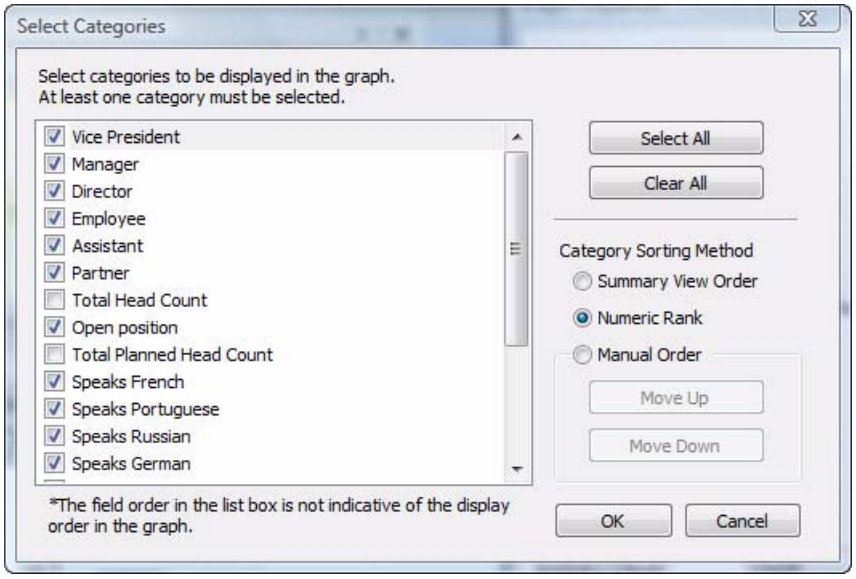


Figure 72

2. You can select each category (position type or group) individually or click Select All. If you decide to select only specific categories, you can Clear All, and then select the appropriate check boxes.

3. in the **Category Sorting Method** area of the dialog, choose to sort the selected categories to match the **Summary View Order**, in the category **Numeric Rank** in the graph, or by sorting them in **Manual Order**.

4. If you select **Manual Order**, the Move Up and Move Down are enabled to arrange the categories as you want them.

5. when you have selected your categories and the sort order, click **OK** to close the dialog and return to the **Graphs** tab. Click **Cancel** to discard selections and close the dialog.

Using the Graphs Tab Toolbar

When the **Graphs** tab is selected in the *Summary View*, there are several buttons available. All buttons are enabled when you select a graph.

Button	Function
New	Click this button to create a new graph. Double-click on the new graph to set graph properties.
	Click this button to delete the selected graph. A message asks for confirmation.
	Click this button to open the *Graph Properties* dialog for the selected graph.
Align Align	Click this button to toggle the alignment vertically or horizontally when multiple graphs exist.
Copy	Click this button to copy the selected graph to the clipboard in order to paste into another application.

Printing a Workforce Analysis Graph

Graphs are available for printing when the Print Wizard is enabled. Each graph will print one to a page.

1. Open your chart then open the *Summary View* by selecting **View** in the Main menu and **Summary View** from the options list. You can also click the Summary View button in the Views toolbar.
2. Select the **Graphs** tab.
3. Click the Print button in the Main toolbar. The *Print Wizard* opens. If you have more than one graph, each graph prints one to a page.
4. Select **Summary View** and click **Next**.

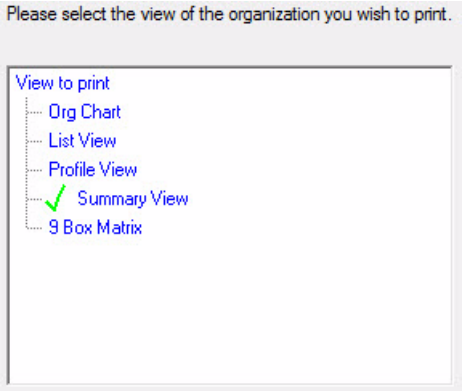


Figure 73

5. Click **Finish** to print the graph. The printed graph displays whatever is shown in the **Graphs** tab, such as a legend or categories.

CHAPTER 2

GETTING STARTED WITH ORGPUBLISHER

The Basics

By reviewing the topics listed below, you will learn the key concepts to help you get the most out of your initial OrgPublisher experience.

You can follow the topics chronologically, or you can link to a specific topic listed below.

Primary Roles in OrgPublisher
Key Elements
OrgPublisher Directory Structure
File Types
Menus and Toolbars
Getting Started with OrgPublisher by creating your first chart
Publishing in Express Mode
Online Knowledge Base

Primary Roles in OrgPublisher

There are three different types of OrgPublisher users and how they typically work with the software.

- **Administrators** create, format, secure, and publish various types of charts, reports, and directories. The OrgPublisher application is typically installed on the chart administrator's PC for this purpose. A Web Administration console, a secured server install that can be accessed, the same as any web page, from any PC, is also available for distributed administration.
- **End Users** access the published charts, reports, and directories using web-based viewing solutions (such as your company intranet) or offline options (such as Adobe PDF, Microsoft PowerPoint, or Microsoft Excel).
- **Planning Users** (users with special privileges) perform org modeling or succession planning scenarios using our web-based viewing solution.

Key Elements

Before we install the software, let's review the various modes and views in OrgPublisher.

Build Mode vs View Mode - If you are an administrator, you'll need to be aware of this. OrgPublisher operates in either *Build Mode* 

or *View Mode* 

. You use *Build Mode* to create, edit, and reorganize data. You use *View Mode* to format and view charts as they will be seen by your users when published.

When building charts from data, remember that any editing of data or hierarchical structure made using *Build Mode* will be **lost** when your chart is refreshed.

Views - The user interface within OrgPublisher displays smaller windows called views.

- The Chart View is the main window and contains the chart components arranged in boxes.
- The 9 Box Matrix Wizard  allows you to compile the top performers and high potential employees in preparation for succession planning.
- Using the Hover Profile allows users to quickly view key custom fields just by letting the cursor hover over a box component.
- The Tree View  arranges data hierarchy in an outline format.
- The List View  can be used as a telephone listing, and includes a Search View that enables end users to search for and save their own groups.
- The Profile View  can provide employee job or box profiles containing information you may not want to display in the chart box.
- Creating a Side-by-Side Profile View can be used to build groups in conjunction with the *9 Box Matrix* or search results.
- The Groups View lists all groups in the current style.

- The Summary View provides totals and calculated summary totals by position type and group.
- Creating Workforce Analysis Graphs, part of the *Summary View*, allows you to view your summary data as bar graphs or pie charts.
- The Style View displays a list of available styles within the current chart.
- Tabbed Views are available; see Viewing the Tabbed Profile, Using the Tabbed Style Selector, and Viewing the Tabbed Hover Profile.

OrgPublisher Directory Structure

OrgPublisher is installed to the **Program Files** folder on your local drive.

C:\Program Files**OrgPubX** - the OrgPublisher folder containing all application files and sub-folders.

C:\Program Files\OrgPubX**assets** - the sub-folder containing files and graphics used with succession planning.

C:\Program Files\OrgPubX**ChartImages** - the sub-folder containing images used when publishing to EChart thin client.

C:\Program Files\OrgPubX**css** - the sub-folder containing cascading style sheets for thin client publishing.

C:\Program Files\OrgPubX**docs** - the sub-folder containing files and documents used in the sample charts.

C:\Program Files\OrgPubX**images** - the sub-folder containing photos used in the sample charts.

C:\Program Files\OrgPubX**samples** - the sub-folder containing the sample charts.

C:\Program Files\OrgPubX**SAP** - the sub-folder containing documentation and files associated with OrgPublisher for SAP® solutions. This folder may not be included with your installation if you did not specify SAP as your data source.

C:\Program Files\OrgPubX**Web** - the sub-folder containing files required to publish charts.

C:\Program Files\OrgPubX**XML** - the sub-folder containing associated files to create a chart using XML.

File Types

OrgPublisher potentially creates several types of files that contain different information for your chart.

File Extensions	File Contents
OCP	OrgPublisher published chart; if you are working with an EChart, contains information to contact the EChart server. PluginX - Binary chart/template file combined.
OTM	Template formatting; OTM file is matched to the ODB or OCB file to make the chart file.
HTM	Determines the browser type and invokes the PluginX. Also applicable to EChart, both thin and rich client.
OCB	Chart data ASCII file; comma-delimited text file.
ODB	Database connection file.
DLL	EChart file for both thin client and rich client; contains ISAPI DLL; must be in the same web directory as EChart OCP file.
OCS	EChart file for both thin and rich client security; contains EChart data; must be in the same web directory as the EChart OCP file.
BAT	EChart file for both thin and rich client; batch file that can be used for automated EChart publishing.
OPW	Web Administration file.
ODBX	Multiple sources chart file.

Online Knowledge Base

The Aquire web site (www.aquire.com) contains a vast collection of tutorials and FAQs, as well as general information, concerning OrgPublisher and other products.

Click **Support** in the main menu and select Support Portal. From this page, you can access support documents, how tos, and product FAQs, as well as Automation, which gives you access to APIs and sample code if you need to customize OrgPublisher. Connector tools which help you connect directly to your data source, such as PeopleSoft, Oracle HR, etc.

You can also find published versions of the OrgPublisher sample charts that include a directory and planning chart. These charts are web-enabled so you can navigate, search, change views, print, and more.

Getting Started with OrgPublisher

By the time you reach this point the following activities should have occurred:

- OrgPublisher has been installed on your computer.
- Your company's human resource data is in a location that you can access.

-or-

- You have access to data from which you will manually create a chart.

If you are familiar enough with OrgPublisher to create a chart now, proceed with this topic. If you'd like more background information about OrgPublisher, please review The Basics.

To create a new chart or open an existing chart:

1. Open OrgPublisher.
   OrgPublisher displays a blank chart and the *OrgPublisher* dialog.

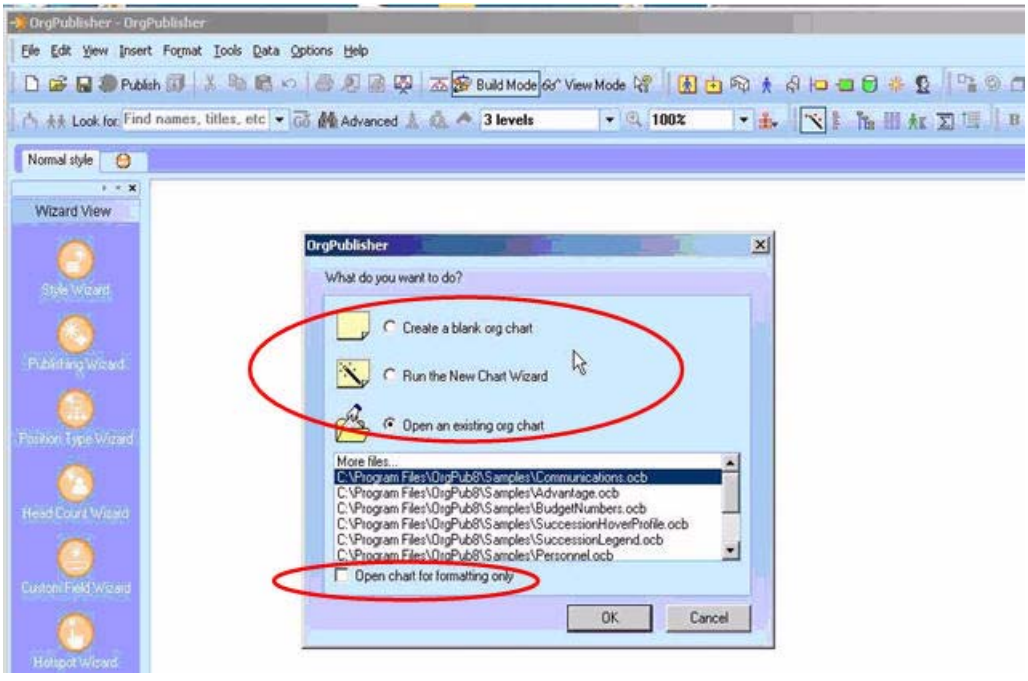


Figure 74

The **Create a blank org chart** option provides a blank org chart to which you can add boxes, enter the employee information into the boxes, and apply formatting.

The **Run the New Chart Wizard** option provides interactive screens to walk you through the process of creating a new chart, either manually or automatically.

The **Open an existing org chart** option is preselected by OrgPublisher, and a list of existing charts is provided from which you can choose.

Choosing the **Open chart for formatting only** option opens an existing chart for formatting changes only. No data changes can be made to a chart opened with this option.

2. Select the option you want then click **OK**.
3. Refer to the appropriate procedure to continue:

What You Need to Know

Running the New Chart Wizard

Creating a Blank Org Chart

Opening an Existing Chart

Opening a Chart for Formatting Only

Identify a Broken Hierarchy

What You Need to Know

When creating a chart

There are two ways you can build organizational charts in OrgPublisher:

Automatically

By connecting directly to a data source. You will need to know the path to that data. OrgPublisher provides the ability to access data from multiple locations. Your IT department should be able to provide you with this information.

Manually

By placing boxes on a chart and entering employee information into the boxes.

When building from data

You should have an understanding of how your company's reporting relationships work, the layout of your company's reporting relationships, and other HR data so that you can properly map the data for OrgPublisher. It is also useful if you have experience in:

- Querying a database.
- Writing VBA scripts (for automating charting processes).
- Adding and extracting data from a database.
- Operating a Microsoft Windows spreadsheet application.

You should also familiarize yourself with the system requirements and parameters.

Chart Parameters

Browser Requirements to interactively view charts residing on a web server or platform

Minimum System Requirements

EChart Thin Chart Publishing Requirements

EChart Rich Client Publishing Requirements

Real-time Chart Publishing Requirements

Web Administration Requirements which is a custom installation and may involve additional work on the part of your web administrator

Planning Chart User Requirements to enable users to modify and share web-based org model (what-if) planning charts

Running the New Chart Wizard

1. Open OrgPublisher and select **Run the New Chart Wizard**.

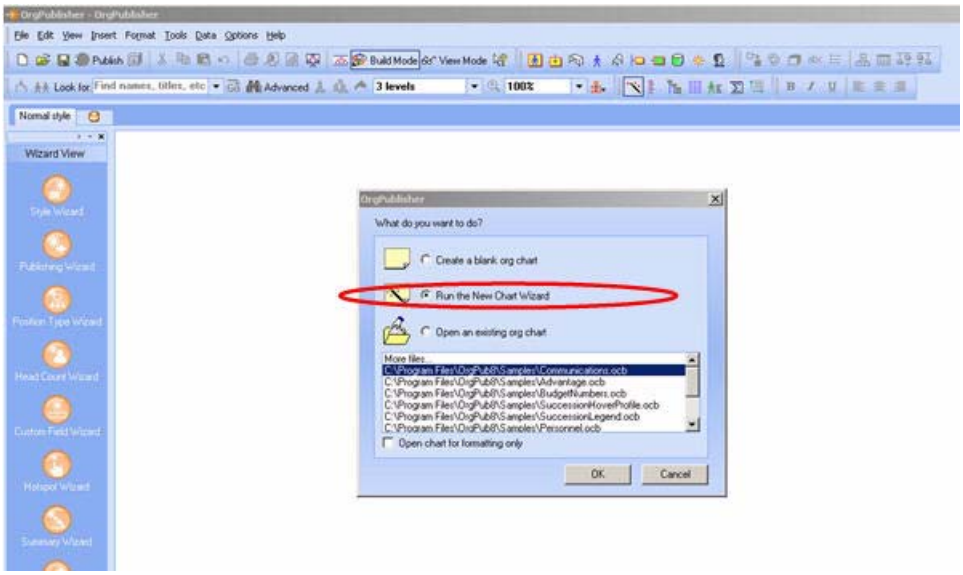


Figure 75

2. If the Succession Planning Module is included with your license, the first dialog provides two options. Select **Organizational chart** then click **Next**.

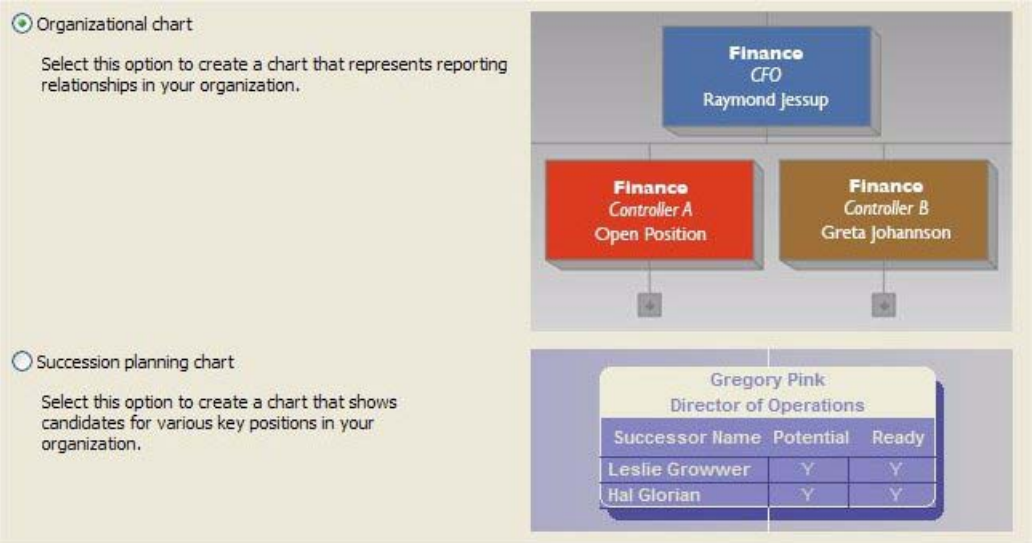


Figure 76

3. In the *Select a data source* dialog, select a source for your data then click **Next**.

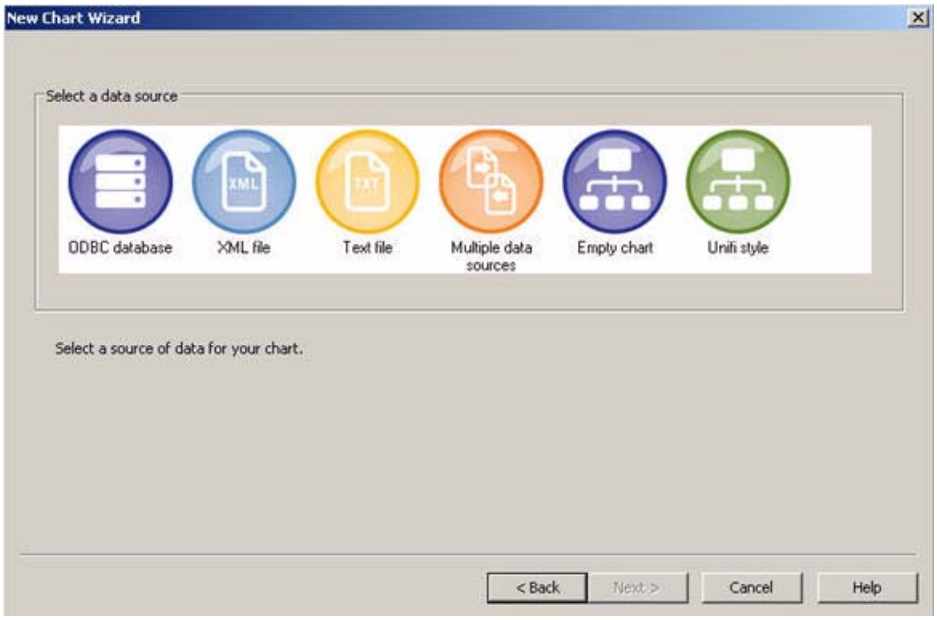


Figure 77

Note: *If you do not know what your data source type is, see your OrgPublisher Administrator.*

Succession planning, multiple data sources, and Unifi Style are considered advanced org chart options and are not part of this section.

If you selected:

ODBC database, go to the Creating a Chart From an ODBC Database procedure.

XML file, go to the Creating an Org Chart from an XML File procedure.

Empty chart, go to the Creating a Blank Org Chart procedure.

Creating a Chart From an ODBC Database

1. In the New Chart Wizard *Select a data source* dialog, select **ODBC database** then click **Next**.

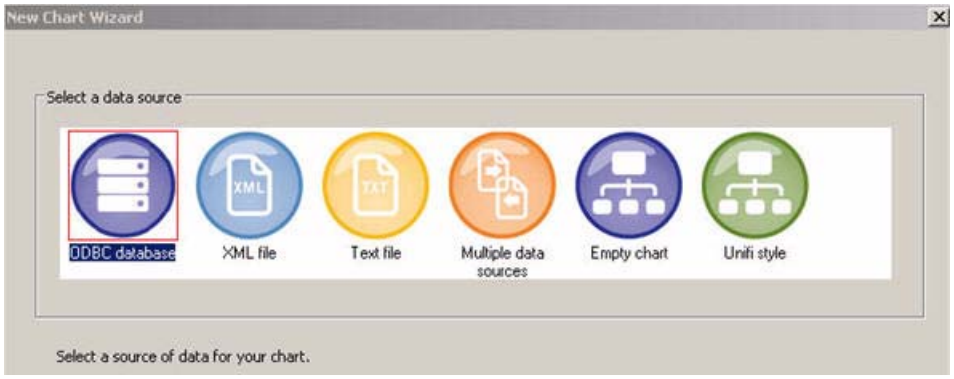


Figure 78

The next dialog box allows you to specify the **ODBC Data Source Name (DSN)**.

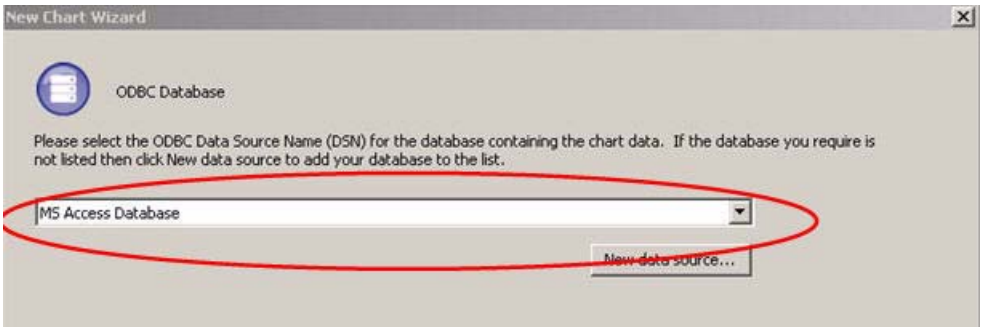

New Chart Wizard
ODBC Database
Please select the ODBC Data Source Name (DSN) for the database containing the chart data. If the database you require is not listed then click New data source to add your database to the list.
MS Access Database
New data source...

Figure 79

2. In the *ODBC Database* dialog, click the down arrow and select the type of database containing your chart data. Click **Next**.

-or-

If your data source is not listed, click **New data source** and follow the instructions in the *Select Data Source* dialog.

The *Select Database* dialog opens.

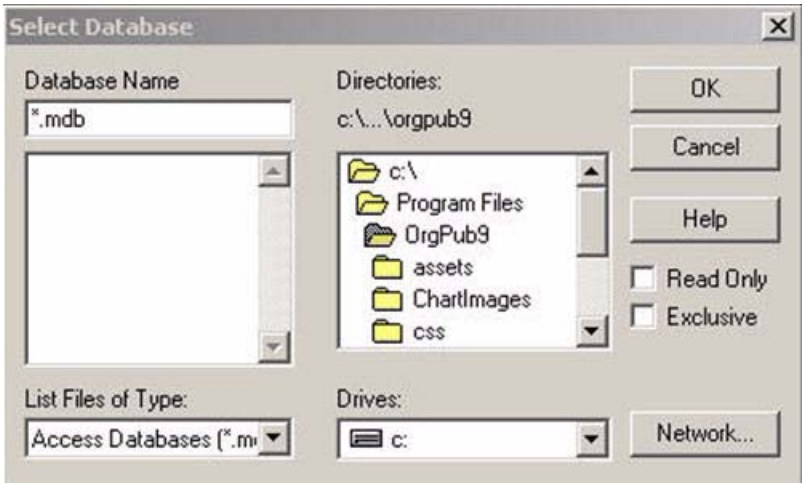


Figure 80

3. Indicate the path and filename of the database containing your data then click **OK**.

The next dialog allows you to select the database table, view, or query that contains the data for your chart.

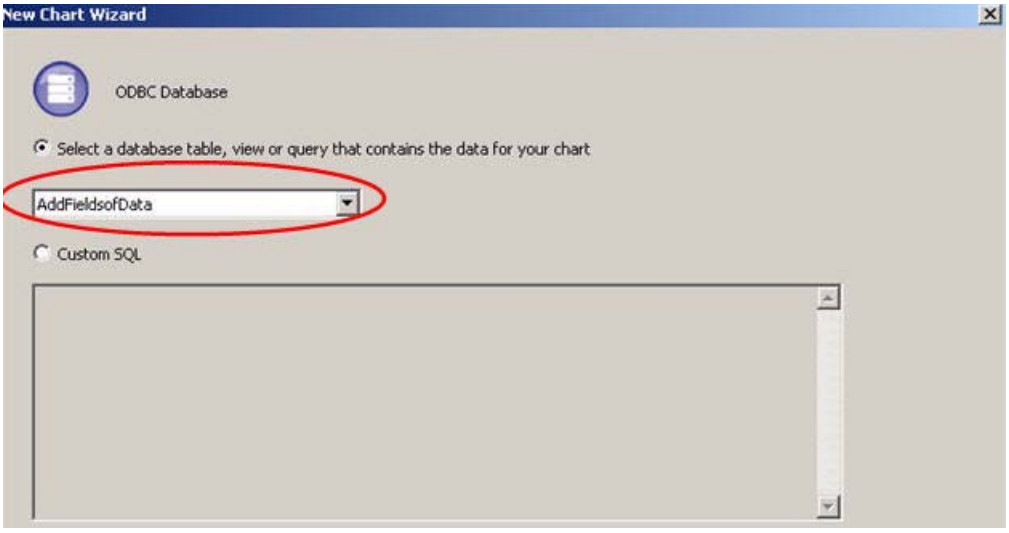

New Chart Wizard
ODBC Database
Select a database table, view or query that contains the data for your chart
AddFieldsofData
Custom SQL

Figure 81

4. Click the **Select a database table, view or query that contains the data for your chart** option. Click the down arrow and, from the options list, select the table containing the data from which you want to build your chart. Click **Next**.

Note: *The Custom SQL option is addressed in advanced procedures.*

The *Data preview* dialog opens, and the first 100 records are shown.

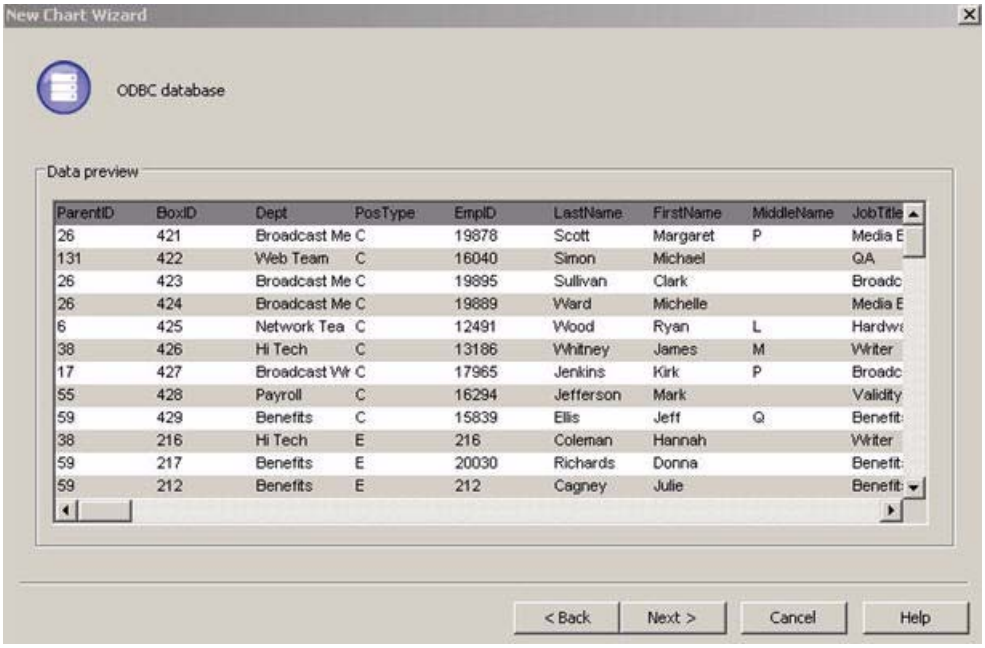

New Chart Wizard
ODBC database
Data preview
ParentID BoxID Dept PosType EmpID LastName FirstName MiddleName JobTitle
26 421 Broadcast Me C 19878 Scott Margaret P Media E
131 422 Web Team C 16040 Simon Michael QA
26 423 Broadcast Me C 19895 Sullivan Clark Broadc
26 424 Broadcast Me C 19889 Ward Michelle Media E
6 425 Network Tea C 12491 Wood Ryan L Hardwa
38 426 Hi Tech C 13186 Whitney James M Writer
17 427 Broadcast Wr C 17965 Jenkins Kirk P Broadc
55 428 Payroll C 16294 Jefferson Mark Validity
59 429 Benefits C 15839 Ellis Jeff Q Benefit
38 216 Hi Tech E 216 Coleman Hannah Writer
59 217 Benefits E 20030 Richards Donna Benefit
59 212 Benefits E 212 Cagney Julie Benefit
< Back
Next >
Cancel
Help

Figure 82

5. Review the data to determine that it is the data you want, and then click **Next**.

Note: *If the data is not correct, click Back to connect to another database.*

The next option allows you to accept the standard OrgPublisher field order or specify a custom order.

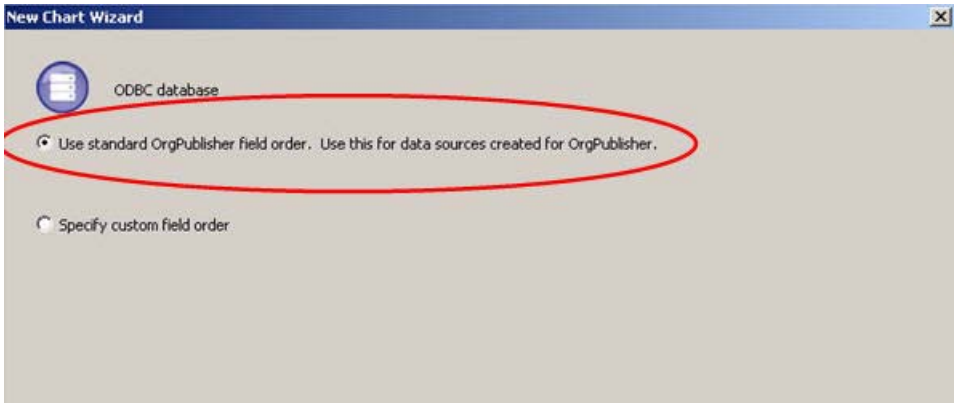

New Chart Wizard
ODBC database
Use standard OrgPublisher field order. Use this for data sources created for OrgPublisher.
Specify custom field order

Figure 83

6. Select the appropriate option for your field order. The default selection is **Use standard OrgPublisher field order**. If the table, view, or query selected is not laid out in the field noted in the Input File Layout, see the Specifying a Custom Field Order procedure. This provides the mapping option. Click **Next**.

   When you select the default field order, OrgPublisher displays the following dialog box.

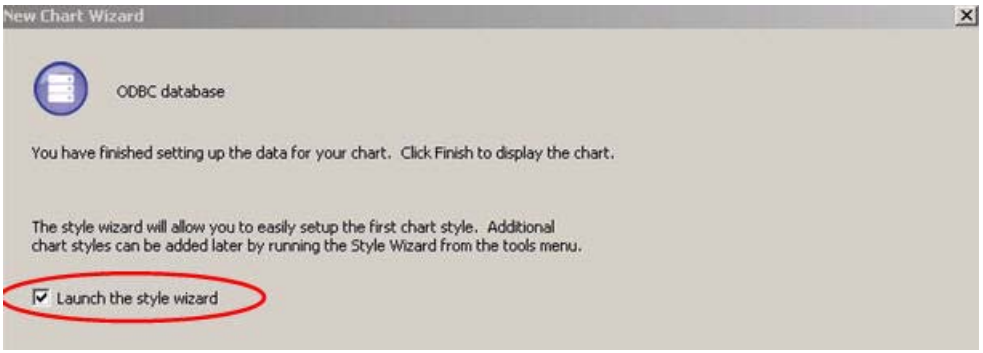

New Chart Wizard
ODBC database
You have finished setting up the data for your chart. Click Finish to display the chart.
The style wizard will allow you to easily setup the first chart style. Additional chart styles can be added later by running the Style Wizard from the tools menu.
Launch the style wizard

Figure 84

7. If you do not want to **Launch the style wizard**, clear that check box. Click **Finish**.

   OrgPublisher displays your org chart.

Specifying a Custom Field Order

This procedure assumes the following:

- You are building an org chart from an ODBC database.
- You have become familiar with the OrgPublisher Input File Layout requirements.
- You have reviewed the *Data Preview* in the New Chart Wizard.
- You have clicked **Next** in the *Data Preview* dialog to accept the data.

When building a chart from an ODBC database, OrgPublisher provides two options for sequencing the data fields in the database:

1. After accepting the data preview, the next option allows you to accept the standard OrgPublisher field order, or you can **Specify custom field order** as illustrated below.

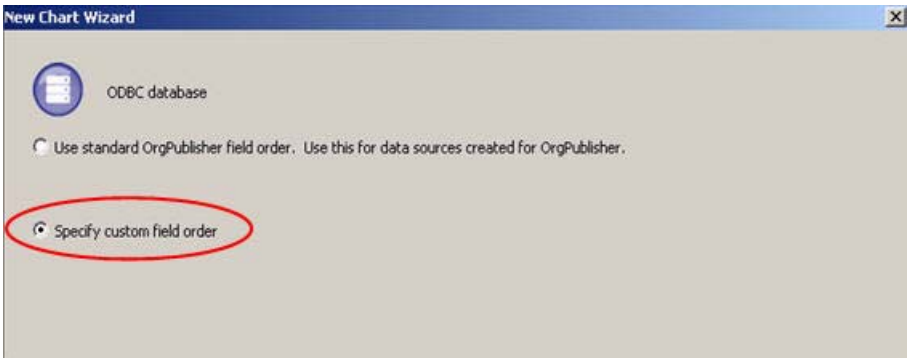

New Chart Wizard
ODBC database
Use standard OrgPublisher field order. Use this for data sources created for OrgPublisher.
Specify custom field order

Figure 85

2. Select **Specify custom field** order then click **Next**.

   The *Data Preview* dialog enables you to map the displayed field names to the OrgPublisher input layout.

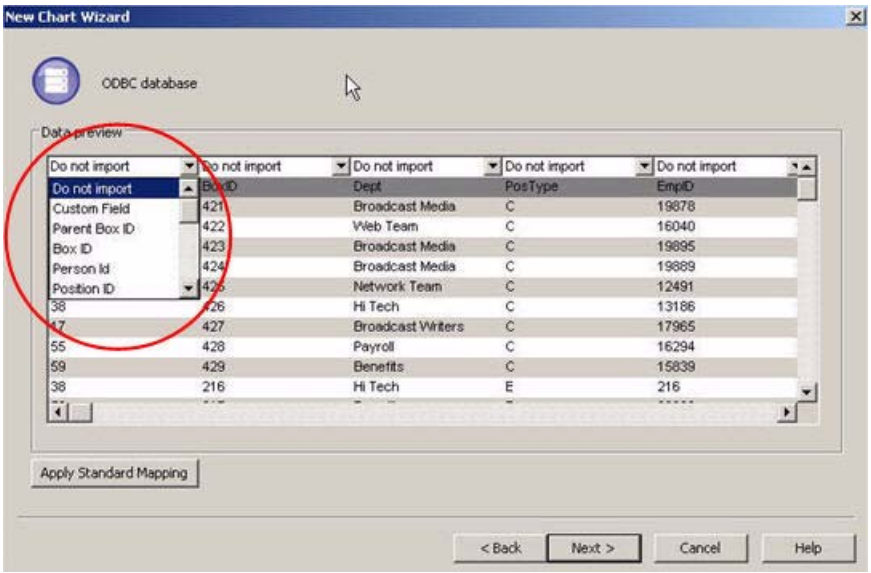


Figure 86

3. Above each column of data, a drop-down arrow appears with the default selection of **Do not import**. Click the drop-down arrow to display other field options. Select the appropriate option for that field/column of data.

   As you select the field options (other than **Custom Field**) in the drop-down list and move to another column the previously selected

mapping options "fade." This indicates that you have already identified a field/column for this type.

If a field type (other than **Custom Field**) is used more than once, the field type switches to red text. Duplicate usage of a field type must be limited to **Custom Fields**.

Other mapping options in the list include **Parent Box ID**, **Box ID**, **Person ID**, **Position Sequence**, **Level Number**, etc.

When you finish mapping, click **Next**.

4. You may need to map a single column of data as more than one field type. For instance, you have a column of data that contains the Employee Number. You want to use it as input field 5 (**Person ID**) as well as display the field in the chart as a custom field. Scroll down to the last field type option and click **Multiple**. The *Multiple Field Mapper* dialog opens.



Figure 87

5. Click **Add**. The *Multiple Field Mapper* inserts **Custom Field** as the first mapping type.

6. In the **Name** column, click **Custom Field** to display all the available options.

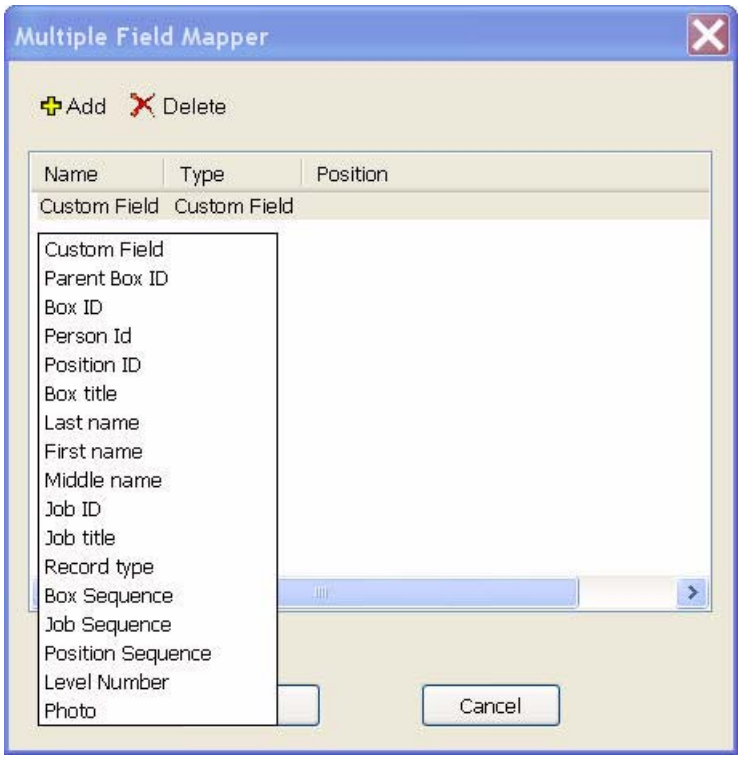


Figure 88

7. Select the field type you want to apply.
8. Click **Add** to insert the second instance of the field.
9. Repeat Steps 6-8 if applicable.

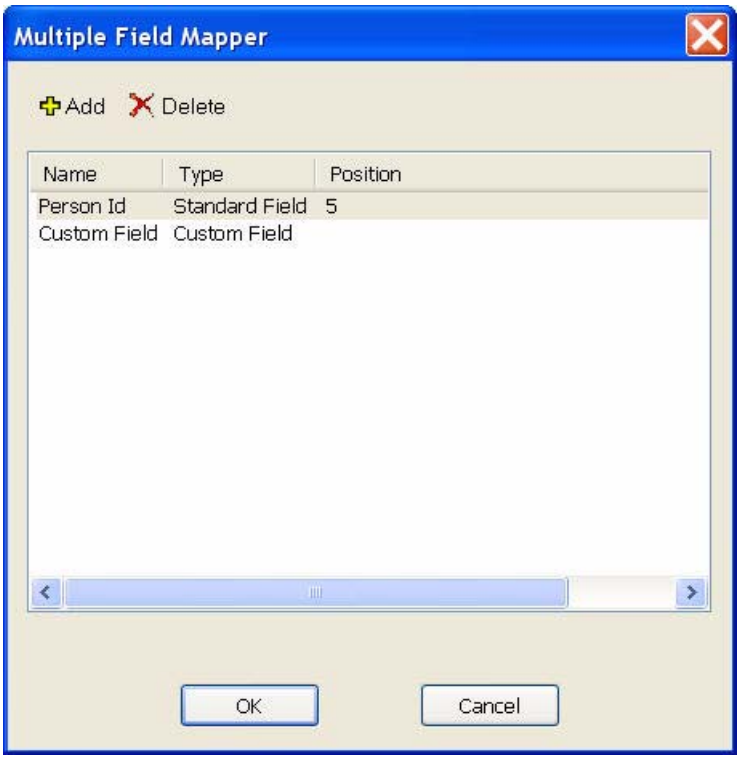


Figure 89

10. Click **OK** when you have finished mapping the field. The mapped column is now labeled as **Multiple** in the *New Chart Wizard*.
11. Complete mapping your fields then click **Next**.
12. If you do not want to **Launch the style wizard**, clear that check box. Click **Finish**.
13. OrgPublisher displays the chart. Any custom fields or custom position types brought into the chart must be defined in OrgPublisher.
14. Save the chart file. It will have an **.odbx** extension.

Name and Assign Your Custom Fields

In addition to the predefined, required data fields of the Input File Layout, OrgPublisher provides the capability for an unlimited number of fields that can be imported and customized to include data that is unique to your environment.

You can keep the names of these fields as they exist in your HR data source or you can rename them. Custom fields can be used for information like telephone numbers, office numbers, sales figures, and so forth. An E-mail custom field type enables you to send email messages to a group. Custom fields can contain either text or numeric data, such as head count, sales, and expenses. OrgPublisher can perform simple calculations on numeric fields and the results of the calculations are stored in summary fields. The Summary Wizard topic explains how to insert summary fields and head counts.

Some custom fields, like phone numbers and office locations, might be assigned to all position types. Other custom fields might need to be limited to a specific position type, for example fax numbers for all administrators.

Custom fields added below box titles contain information pertinent to the whole department or team that the box represents. Custom fields added below a job title contain information about that job. Custom fields added below a person contain specific information about that person or the position they hold.

Custom Fields in OrgPlan

The administrator maintains control over the custom fields to use in the planning chart. Planners cannot add or delete custom fields.

To learn about how custom fields fit in the input data layout, see:

Input File Layout

Input File Layout Rules

To create a custom field, see:

Custom Field Wizard

Adding a Custom Field

Formatting a Custom Field

Formatting Numeric Custom Fields

Dragging and Dropping Custom Fields

Inserting a Custom Field for a Single Position Type

Inserting a Custom Field for all Position Types

Reviewing Custom Field Security Summary

Securing an EChart Custom Field

Designating Custom Fields as Not Searchable

To manage your custom fields, see:

Changing the Contents of a Custom Field

Displaying a Custom Field

Changing the Custom Field Label

Hiding a Custom Field Label

Linking to your Data Source

You must know how to link to your data source to create your chart, manage your data, and resolve reporting relationship problems.

Your system administrator may need to provide some of the information required to connect to your database. To share a database connection file with another user, you must use a file **DSN** on a shared network path when you save the ODB file.

In order to create a chart from data, you can connect to an ODBC-compliant database and extract data for your organizational chart. You can also connect to, or create, a text file to use as input for creating your chart.

Use the New Chart Wizard to connect to your HR database. A series of dialogs helps you select the data source, tables, etc. These selections form an **SQL** statement that is used to extract data from your database. This statement is formed from options you select in the wizard dialogs, starting with the database to use as your source. You can also write your own **SQL** statement. For query samples, refer to the Downloads section of the Aquire web site at www.aquire.com.

Once you have saved the file with your connection, you can reconnect to the same database by opening the chart's ODB file.

To review the error messages OrgPublisher may generate see:

Addressing Warnings and Error Messages

Identify a Broken Hierarchy

One of OrgPublisher's most valuable features is the ability to track reporting relationships. When you create your input file layout for your first chart and define your relationship hierarchy, OrgPublisher remembers that hierarchy.

OrgPublisher determines if any of the established relationships are broken when you open your chart built from data. For instance, if a manager should leave your company, and is deleted from your database, and if the records for the employees who reported to that manager are not changed to reflect a new reporting relationship, OrgPublisher generates an error report listing those broken hierarchies.

The following is an example of the error message:

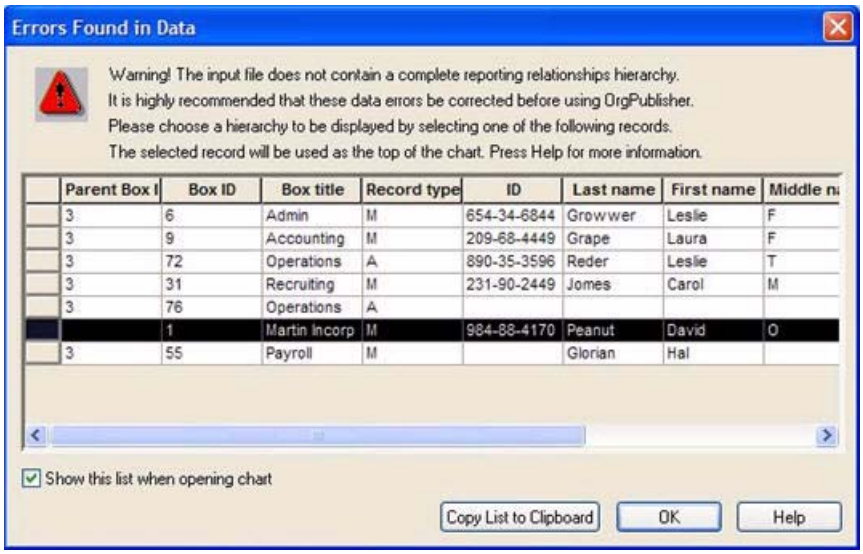

Errors Found in Data
Warning! The input file does not contain a complete reporting relationships hierarchy.
It is highly recommended that these data errors be corrected before using OrgPublisher.
Please choose a hierarchy to be displayed by selecting one of the following records.
The selected record will be used as the top of the chart. Press Help for more information.
Parent Box I
Box ID
Box title
Record type
ID
Last name
First name
Middle ni
3 6 Admin M 654-34-6844 Growwer Leslie F
3 9 Accounting M 209-68-4449 Grape Laura F
3 72 Operations A 890-35-3596 Reder Leslie T
3 31 Recruiting M 231-90-2449 Jomes Carol M
3 76 Operations A
1 Martin Incorp M 984-88-4170 Peanut David O
3 55 Payroll M Glorian Hal
Show this list when opening chart
Copy List to Clipboard
OK
Help

Figure 90

You can copy the list and use it to correct your HR database and then update your chart.

For more information see:

Resolving Reporting Relationship Problems

Addressing Warnings and Error Messages

Updating Your Chart

You can update chart data after you have created your organizational chart by refreshing the chart data with changes made to the database. If your chart was created from multiple data sources, you can also manage data sources through the **Tools** menu.

Note: *You can also update a published real-time chart by clicking the Refresh button in the browser or by drilling through the chart.*

You may want to change chart data in the OCB file to reflect personnel changes that have not yet been applied to your HR database. When you overwrite or manually update a chart that was created with a database connection, an OCB file is created.

Refreshing Chart Data

OrgPublisher updates your chart built from data every time you open that chart. You can also keep the data in your org chart up-to-date while you are working in your chart. The following steps explain how to do this manually. Detailed information about automating this process can be found in the OrgPublisher System Development Kit (OPSDK).

1. Open the ODB file for the chart you want to update. Your database connections are reestablished and your org chart is displayed.
2. Select **Data** from the Main menu then **Refresh** from the pull-down menu. Any changes made to data in your HR database are applied to the chart data.

Creating a Blank Org Chart

Creating a blank org chart is the first step to building a chart manually. You insert each box then populate each box with the employee information. You can also design the box and chart format, or you can apply a preformatted chart design provided by OrgPublisher.

The first step is to insert a box. This box must contain a person and a job. To insert these two components at the same time, select the Person/Job box button from the Insert Toolbar. (See Box Style Button Descriptions and Purposes for the purpose and behavior of each button.)

Once you have inserted the first box into your chart, you can begin building your chart levels by inserting additional boxes.

Refer to the following topics:

Inserting Boxes In a Chart

Inserting Chart Components

Box Style Button Descriptions and Purposes

Identifying and Using Pointers

Inserting the First Box and Person in a Chart

When you manually create an org chart, you start with a blank chart, and then insert each box, enter all of the relevant information into each box, and then format the chart.

1. From the Main menu, select **Insert** then **Person in box** from the options list.



Figure 91

You can also select the Insert Box containing a person button in the Insert toolbar. Click and releas e mouse. Notice that the cursor, or pointer, has changed to .

2. Click inside the chart to place the box. The **Box title**, **Job title**, and **Name** fields appear inside the box.

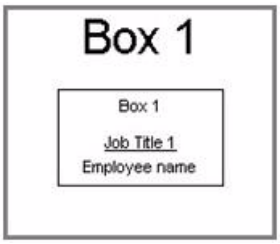


Figure 92

Because this is a new chart, the first box is placed at the top and middle of the new chart window.

3. Inside the box, click the **Employee name** text and replace the field name with the name of the employee. Press **ENTER**.

4. Double-click the **Job Title 1** text. The *Rename Job Title* dialog opens.

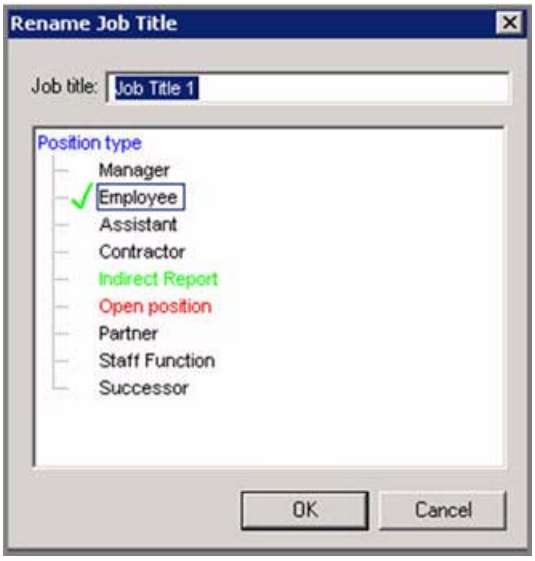


Figure 93

5. Type the **Job title** and select the **Position type**. Click **OK**. The *Rename Box Title* dialog opens.



Figure 94

6. Type the **Box title** then click **OK**. The new name appears inside the box and at the top of the chart. When you rename **Box 1** (inside the box), that name becomes the chart title. This is typically the name of your organization or a department name, but may be whatever works best for your chart. See the Formatting the Chart Title procedure for more information.

Add additional boxes to your chart, using the Inserting Boxes In a Chart procedure. See the Box Style Button Descriptions and Purposes topic to help identify appropriate buttons.

Inserting Boxes In a Chart

Boxes can be manually inserted into charts by either of the following two methods.

1. From the Main menu bar select **Insert**.
   The **Insert** menu displays the options available.



Figure 95

-or-

The Insert toolbar also displays the box style buttons.



Figure 96

2. Select a box style, click the button, and then click inside the chart to place the box.

See the Box Style Button Descriptions and Purposes and Inserting Chart Components topics for additional information.

Box Style Button Descriptions and Purposes

The following table describes each box style and its purpose.

Button	Name	Description
	Insert Box containing a person and job	Inserts a box containing a person. Includes fields for: • Box Title • Job Title • (Manager, Employee, etc,) name If it is the first box in a chart its placement determines the top of the chart. If it is not the first box in the chart it is added directly below the box it reports to.
	Insert box	Inserts a normal box containing only the **Box Title** field. If it is the first box in a chart its placement determines the top of the chart. If it is not the first box in the chart it is added directly below the box it reports to.
	Insert Job	Inserts **Job Title** and **Employee name** fields into an existing box. If it is the first job added to the box, the label is **Manager name**. Any additional jobs added to the same box will be specified Employee name.
	Insert Person	Inserts **Job Title** and appropriate (Employee, Assistant, etc.) name fields into an existing box. If it is the first job added to the box, the name field reflects a **Manager** position type. Any additional persons added have the name field labeled **Employee**.
	Insert Open Position	Inserts an **Open position** field into an existing box.

Button	Name	Description
	Insert Assistant Box	Inserts an assistant box into the chart and designates an employee as the assistant to the position to which it is attached. It is inserted below and to the right of a selected box. If you insert more than one assistant box, these boxes alternate from the right and then to the left of the reporting box. When you insert an assistant, the text **Assistant Box** followed by the number of the box in the chart, is placed into the box as the box title.
	Insert Partner Box	Inserts a partner box into the chart. Represents the equal yet independent relationship of a business partner by inserting and connecting a partner box on the same level and to the right of the box on which it is dropped. Multiple jobs and people can be placed in a partner box. When you insert a partner, the text **Partner Box** followed by the number of the box in the chart, is placed into the box as the box title.

Identifying and Using Pointers

The appearance of the mouse pointer changes in OrgPublisher when you add or move chart components such as boxes, jobs, or people. These special pointers indicate the type of object dragged in your chart.

When you drag an existing box, the pointer also shows the box's relationship to other boxes. When you drag a new object, a plus (**+**) sign appears with the special pointer indicating a new component.

Special pointers and their functions are:

Pointer	Function
	Inserts a person/job box.
	Inserts an assistant box below and to the right of a selected box. If there is more than one assistant, alternate between the right and left side of the selected box.

Pointer	Function
	Inserts a normal box.
	Inserts a box to the left of a selected box.
	Inserts a box to the right of a selected box.
	Inserts a box between two selected boxes.
	Inserts a box below a selected box.
	Inserts a job.
	Inserts a person.
	Inserts an open position.
	Inserts a partner box.
	Inserts a photo.
	Inserts a custom field. Custom fields are always inserted from the Insert Custom Field button, never from one box to another.
	Inserts a hotspot. Hotspots are always inserted from the Insert Hotspot button, never from one box to another.
	Selects an area to display as the center of the chart after you use the Zoom to point option. Zoom automatically sets magnification to 100%.

Opening an Existing Chart

To open an existing org chart:

1. Open OrgPublisher.
   OrgPublisher displays a blank chart and the *OrgPublisher* dialog.

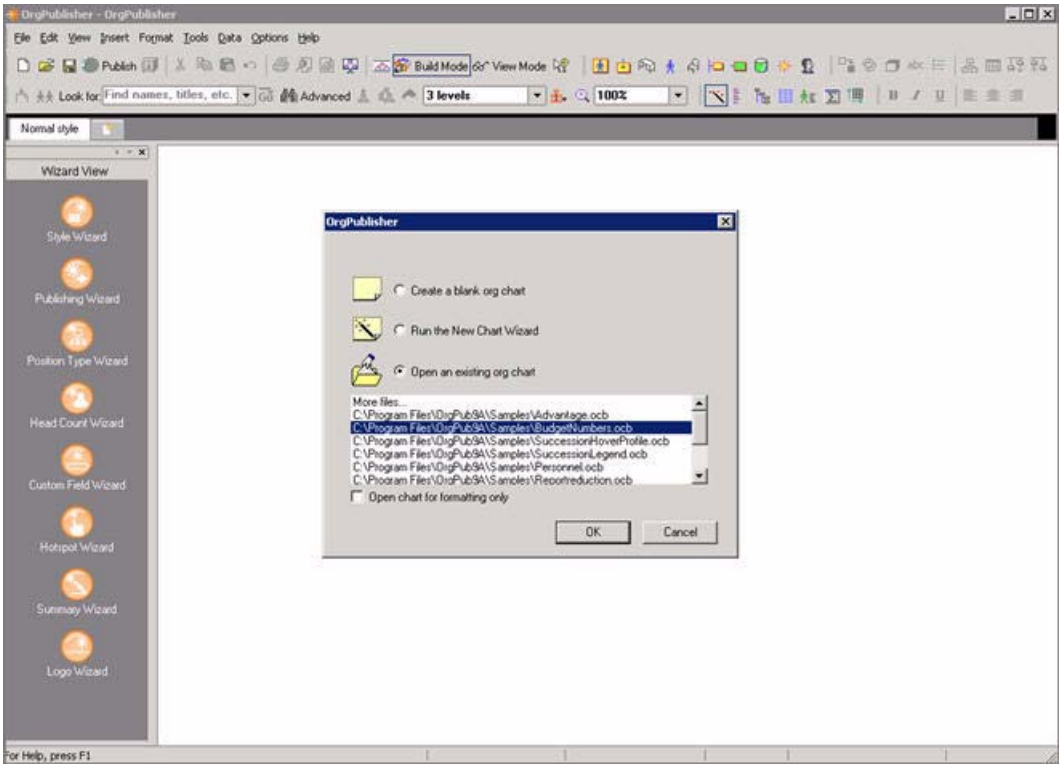


Figure 97

2. Select the **Open an existing org chart** radio button.
3. Select the file name of the chart you want to open then click **OK**.
   The selected chart file opens.

Entering a New License Key

If you, as an administrator, request a licence upgrade or a trial extension of OrgPublisher, a new license key is provided by your Aquire sales associate. ***Only the OrgPublisher administrator can successfully enter a license key on the computer where OrgPublisher resides.***

1. When you receive the new key, open OrgPublisher and select **Help** in the Main menu.
2. Select **License Information** from the options list. The *Licensing Information* dialog opens, showing your license number and all

features currently enabled, as well as your **Position Count** and expiration date, if applicable.

3. Click **Enter new key**. The *License Key Entry* dialog opens.
4. Copy the provided key from your email message and click **Paste Key**. The license key displays in the **Please enter a license** field.
5. Type your company name in the **Registered Company** field. Click **OK** to accept the new key.

   If an error message displays stating you have entered invalid information, click the **Back** button and verify that the license key and company name are correct and retry.

Note: *In the Web Administration server, the new license information is read when the remote administration server starts, after IIS is refreshed.*

What You Can Do with OrgPublisher

Creating a Chart From an ODBC Database

Creating an Org Chart from Multiple Data Sources

Publishing in Express Mode

Creating a New Planning Chart or Creating a New Succession Planning Chart

Printing in Wall Chart Style or Printing Your Chart as a Book

Creating a New Archive Chart

Displaying Summary Fields

Drag and drop people and positions into the chart by Inserting Boxes In a Chart

Applying a Chart Design Template to quickly format charts

Refer to the Table of Contents for more.

CHAPTER 3

CREATE YOUR CHARTS

Build and Modify Charts from a Data Source

Note: *If you plan to use the Compare Two Charts feature, it is strongly recommended that you create a custom field called Position ID and assign a unique ID to each instance of a person in the chart. In addition, each open position should be assigned a unique ID.*

An Input File record represents an open position when the Last Name, First Name, and Middle Name fields are empty.

Example: HQ,ABC,"ABC Department",M,9-99999999,"","","",JOB001,"Supervisor"

Input File Layout

The Input File Layout defines the order of columns in the comma-separated text file that OrgPublisher opens to generate your org chart. It also specifies the order of fields to send to OrgPublisher when you choose to generate org charts automatically using the Component Object Model (COM) interface.

Each record in an OrgPublisher input file typically represents a manager, an employee, an open position, an assistant, a partner, or a contractor in the organizational chart. In addition, an input record can represent a normal box, an assistant box, or a partner box within the hierarchy of boxes in the chart.

Note: *If you renewed maintenance from a previous OrgPublisher Enterprise version that included the organizational planning client, that feature is included in the OrgPublisher 9 version.*

The first two fields are required to build a reporting structure. These fields can include information from your HR database such as a supervisor ID and an employee ID, or a supervisory department and reporting department. Each person or position in an org chart is represented by only one record in the Input File. However, a person may occupy more than one position in the chart and may appear in multiple input records. The Input File Layout Rules will help you to accurately map your data.

Note: *Field 5 is displayed and searchable by end users. Do not store sensitive information in this field.*

If you are creating a succession planning chart, see the Mapping Succession Planning Fields topic.

Column number	Field name	Description
1	**Parent Box ID**	A required field, the parent box ID can be any string of numbers and/or characters that represent the **report to box** of this record. The parent box ID is not displayed in the chart. Only the top person in a chart will have an empty parent box ID.
2	**Box ID**	A required field, the box ID can be any string of numbers and/or characters that uniquely represent a box within the chart. This ID can be duplicated for several records when multiple people are located in the same box. The box ID is not displayed in the chart. You can add a unique box ID, typically an employee ID from your database. You can also use a position code if you use position management. Where the employee is placed in the chart depends on the **Auto Build** option, the position type **priority**, and the **Sort** option. **Note:** *If you use the matrix reporting, or multi-relationship feature in OrgPublisher, the box ID for the person reporting to more than one person must be unique for each instance in the chart in order ensure correct drilling up through hierarchy.*
3	**Box title**	A required field, the box title can be any string of numbers and/or characters and is shown as the top text entry in the org chart box that it describes. This can be a cost center or full department name. The box title should be unique to the box ID that is also contained in this record. The same box title is displayed in every record that contains this box ID.

Column number	Field name	Description
4	**Record Type**	A required field, record type defines the position type of each person in your organization. OrgPublisher provides several predefined record types. You can also create custom record types to define other positions in your organization. Record types for custom position types should use brackets, for example **<T>**. **M** = Manager **E** = Employee **A** = Assistant **I** = Indirect report **PR** = Partner **C** = Contractor **B** = Box **SF** = Staff Function **SC** = Succession Candidate If left blank, it defaults to an employee record type. You cannot insert a person in a B record type. It is typically used to display org units or departments only.
5	**Person ID**	The person ID field is optional. It can contain any string of numbers and/or characters to represent the ID or unique identifier for a person, such as employee ID. With OrgPublisher version 5 and later this field is used to add a person to a group and to identify a person in order to add a multi-relationship icon. Therefore, the field is displayed and searchable by end users. ***Do not store sensitive information, such as a social security number, in this field.*** **Example:** HQ,ABC,"ABC Department",M,9-999999,"Smith","Rose",,JOB001,"Supervisor"

Column number	Field name	Description
6	**Last Name**	A required field, the last name field represents the last, or family, name of the person a record represents. **Example:** HQ,ABC,"ABC Department",M,9-99999999,"**Smith**","Rose",,JOB001,"Supervisor" **Note:** *An Input File record represents an Open position when the Last Name, First Name, and Middle Name fields are empty.* *Example:* *HQ,ABC,"ABC Department",M,9-99999999,"","","",JOB001,"Supervisor"*
7	**First Name**	The first name field represents the first name of the person that a record represents. **Example:** HQ,ABC,"ABC Department",M,9-99999999,"Smith","**Rose**",,JOB001,"Supervisor" **Note:** *An Input File record represents an Open position when the Last Name, First Name, and Middle Name fields are empty.* *Example:* *HQ,ABC,"ABC Department",M,9-99999999,"","","",JOB001,"Supervisor"*
8	**Middle Name**	The middle name field represents the middle name of the person that a record represents. **Example:** HQ,ABC,"ABC Department",M,9-99999999,"Smith","Rose","**L**",JOB001,"Supervisor" **Note:** *An Input File record represents an Open position when the Last Name, First Name, and Middle Name fields are empty.* *Example:* *HQ,ABC,"ABC Department",M,9-99999999,"","","",JOB001,"Supervisor"*

Column number	Field name	Description
9	**Job ID**	The job ID can be any string of numbers and/or characters that uniquely represent a job title or position title within the chart. If records are combined into one box, job titles are defaulted to list in ascending sequence by job ID and are sorted within each position type. The job ID is not displayed in the chart. This field is used in **Auto Build**.
10	**Job Title**	A required field, the job title can be any string of numbers and/or characters and is shown above he individual name within a box. A job title is associated with the first position type beneath the job title. The priority of the position type determines the order of job titles of different position types appearing within a box. You can override the priority by assigning the sequence number in field 13 of the comma-delimited text file. In the following example, each record that contains job ID "JOB001" also contains the job title "Supervisor." **Example:** HQ,ABC,"ABC Department",M,,"Smith",'A',,JOB001,"**Supervisor**" HQ,ABC,"ABC Department",M,,"Turner","B",,JOB001,"**Supervisor**" HQ,ABC,"ABC Department",M,,"Brown","K",,JOB001,"**Supervisor**"
11	**Reserved**	Field 11 is reserved for use by OrgPublisher. To avoid problems when you are creating an org chart automatically from data, and to ensure compatibility with future versions of OrgPublisher, leave this field blank.
12	**Box Sequence Number**	Field **12** is the box sequence number and accepts only numeric (integer only) characters. It can be used, but is not required, to override the default positioning of the boxes. By default, boxes are positioned from left to right (level by level) in your chart alphabetically by box ID. This field is used when you select the **Sort by box ID** option of the OrgPublisher **Sort** feature.

Column number	Field name	Description
13	**Job Sequence number**	The job sequence number accepts only numeric (integer only) characters. It can be used, but is not required, to override the default positioning of the job title. By default, job IDs are used for sorting multiple jobs within a single box, such as people in the same box as their manager.
14	**Position Sequence Number**	The position sequence number can be used, but is not required, to override the default positioning of the employee name, and must be numeric (integer only) characters. By default, multiple employee names are sorted alphabetically within a single box.
15	**Photo**	The file names of the photos in your chart are stored in the photo field. Add photos with the Photo Wizard so that you can specify a common path for all of your photo files. If photos are stored in different areas you must put the full path name in this field.
16	**Reserved**	Fields 16 is reserved for use by OrgPublisher. To avoid problems when you are creating an org chart automatically from data and to ensure compatibility with future versions of OrgPublisher, leave this field blank.
17	**Position ID**	OrgPublisher looks for Position ID in field 17. Position IDs are used for: **-** Tracking position movement in OrgHistory. **-** Tracking what positions have been pinned in the side-by-side *Profile View*. **-** Importing a chart to Unifi. Unique position IDs are very important for continued synchronization. It's preferable to have position IDs in the source data if you want to tie changes back to the source system.

Column number	Field name	Description
18	**Level Number**	Level number is used to pass in your levels for use in the multi-level peer display . This is a numeric absolute value level, for instance, if the manager grade level is 10 and the report-to is 1, OrgPublisher charts the report-to box as 9 levels below the manager box. The level number is a differential from the parent level number, either in ascending or descending order. The sequence cannot change in the middle of the ”r;chain.” There are 10 levels to work with at each parent box level; any differential greater than 10 displays at the same level as 10. If there is no value in the parent box, it is assumed to be 0 (zero).
19	**Reserved**	Field **19** is reserved for use by OrgPublisher. To avoid problems when you are creating an org chart automatically from data and to ensure compatibility with future versions of OrgPublisher, leave these fields blank.

Column number	Field name	Description
20-25	**Custom Fields**	Input in fields **20** and up are for your custom fields, such as phone numbers, room numbers and hotspot URLs. After populating these fields in the Input File with your custom data, open the Custom Field Properties dialog and select where these fields should be displayed in your chart. A default label is supplied that you should type over. This example shows custom fields of hire date and phone number in Positions **20** and **21**. If you plan to use the EChart security option, custom fields must be created to hold the unique identifiers for both the **Password** and **User ID**. **Example:** HQ,ABC,"ABC Department",M,,"Smith","A",,JOB001,"Supervisor",,,,,,,,,"1995/12/02","2495" **Note:** *When importing numeric fields, make sure that you do not use any leading symbols, such as dollar signs. Also, verify that decimal places are set the way you want them prior to importing those fields into OrgPublisher.* *You can add leading and trailing symbols to numeric fields with the Field Format dialog, but the decimal places cannot be adjusted after they are imported. OrgPublisher does not change the value of numeric fields you bring in. For instance, if you import 341.00, that's what the number is in OrgPublisher. If you import 341, that's what OrgPublisher uses. Formatting cannot change the value of the data you import.*

Column number	Field name	Description
26-49	**Custom Fields and Summary Fields**	Fields 26 - 49 and 65+ can be used for custom fields, as well as summaries. In OrgPublisher Premier, you can perform basic calculations on numeric custom fields in your chart and display this data in a summary field in your org chart. **Note:** *The Summary Wizard inserts placeholders, if necessary, which display in the Custom Field Properties dialog. These fields within OrgPublisher, occupy sequences 20 -25, and are designated as field types other than summaries, such as **Text**, **Hotspot**, or **Email**. As you create summary fields, OrgPublisher starts placing them in sequence 26.* *When importing numeric fields, make sure that you do not use any leading symbols, such as dollar signs. Also, verify that decimal places are set the way you want them prior to importing those fields into OrgPublisher.* *For example, you can calculate the total sales for a department and display that information in a summary field. The Summary Wizard and Head count Wizard automatically place summary fields in the Input File starting at field 26.* **Note:** *When importing numeric fields, make sure that you do not use any leading symbols, such as dollar signs. Also, verify that decimal places are set the way you want them prior to importing those fields into OrgPublisher.* *You can add leading and trailing symbols to numeric fields with the Field Format dialog, but the decimal places cannot be adjusted after they are imported. OrgPublisher does not change the value of numeric fields you bring in. For instance, if you import 341.00, that's what the number is in OrgPublisher. If you import 341, that's what OrgPublisher uses. Formatting cannot change the value of the data you import.*

Column number	Field name	Description
50-64	**Succession Candidate Fields**	Input fields 50 through 64 are standard fields provided for your succession candidates. After populating these fields in the Input File with your custom data, open the Custom Field Properties dialog and select where these fields should be displayed in your chart. Can be used to help define a successor group. special formatting for a successor position comes automatically with OrgPublisher. **Note:** *Initial formatting of the successor position type is handled in the default templates shipped with OrgPublisher.* **50** - Key Person **51** - Location **52** - Age **53** - Salary **54** - Performance Rating **55** - Education Level **56** - Skills **57** - Certifications **58** - Competency Rating **59** - Successor Rank **60** - Designated Successor **61** - High Potential Rating **62** - Readiness **63** - Retention Risk **64** - Impact of Loss
65 and up	**Custom Fields and Summary Fields**	Positions 26 - 49 and 65+ can be used for custom fields, as well as summaries. In OrgPublisher Premier, you can perform basic calculations on numeric custom fields in your chart and display this data in a summary field in your org chart. See **Notes** in column 26-49.

Record Types

The record type is the position type of a person who works in your organization. A position type can be used to categorize employees. Position types assist in the formatting of boxes and text, and the calculations of various head counts within your organization. The position type/record type determines the order of positions within a single box .

Each person or position in an org chart is represented by only one record in the input file, but a person can occupy multiple positions and have multiple records. You can also create your own record type to define a position within your organization using the *Position Type Wizard* or the *Define* dialog.

If you leave the **Record Type** blank, OrgPublisher sets the position type to "Employee."

Do not use these characters when creating your own custom record type in field 4.

Record Type	Name	Description
M	**Manager**	A manager record type represents a person who is the manager or supervisor of the people in the reporting boxes or within an org box. Manager record types have a **Priority** of **0**. They are placed in their own box unless the **Auto Build** option, in the *Format* dialog **Chart** tab, is set so that managers and employees are placed in the same box. When there is more than one manager under a job title within a box, the names are defaulted to sort alphabetically by last name.
E	**Employee**	This is the default record type. An employee record type represents a person who is an employee within an org box. You can format employee names and boxes separately from manager names and boxes. When there is more than one employee name under a job title within a box, the names are defaulted to sort alphabetically by last name.

Record Type	Name	Description
A	**Assistant**	An assistant record type represents a person who is displayed within an assistant box type. Assistant boxes alternate right and left of the reporting line. You can define custom assistant position types with data using the *Define* dialog, accessed from the **Edit** menu option, by creating a new position type and selecting the assistant box type.
I	**Indirect report**	An OrgPublisher org chart can include indirect reporting relationships as well as direct reporting relationships. Indirect reporting relationships are also known as dotted-line relationships. An input record can indicate a person is an indirect report by using an **I** in the **Record Type** field in front of the assigned position record type. Indirect is a modifier of the assigned position type. For example, an **IE** is an employee who reports indirectly to another position. If you use only **I** as your record type, OrgPublisher defaults the record to **IM**. When an indirect report appears as the top position in a box, the box is formatted with a dotted-line box unless you change this default in the current chart style. In addition, an indirect box has a dotted connecting line to the supervisor box above it. Indicating that one person reports to more than one manager is accomplished with multiple records and use of position types. One box must be designated position type "E" for Employee. Other boxes must be designated position type "I" for Indirect Report. (Indirect Reports are not counted for head count purposes. Indirect Report boxes are displayed with dotted lines around the box, as well as the lines to the box.) When building from data, you need multiple employee records — one for each manager (see sample of data below). If you are building from data the records should look like the following: ParentBoxID BoxID Box Title Record Type ID Last Name First Name Manager 1 1234 xxx E Smith Carol Manager 2 1234a xxx I Smith Carol Manager 3 1234b xxx I Smith Carol

Record Type	Name	Description
C	**Contractor**	A contractor record type represents a person who is a contractor within an org box. Contractor record types are different from other position type records because: Contractors are always displayed after managers and employees within an org box. Contractor names are formatted separately from other position types. Contractors are not counted in the head count with the default settings. You can override the default. When there is more than one contractor under a job title within a box, the names are defaulted to sort alphabetically by last name.
PR	**Partner**	A partner record type represents a person in a partner box type and denotes a side-by-side relationship. A partner box is located on the same level and to the right of the box to which the partner is aligned.
B	**Box**	A box record type reports to another record and may have records reporting to it. A box record type can be used to create a report-to box that does not contain a person or job title, for instance a department or division name. You cannot add persons to a box with **B** record type.
BA	**Assistant box**	An assistant box record type can be used to indicate there are assistants for the report-to box, but names and job titles are not stored in the box, for instance a department or division name that has an assistant. You cannot add persons to a box with **BA** record type.

Record Type	Name	Description
SF	**Staff function**	A staff function record type represents a person very much like an assistant, or a cost center displayed in a staff function box. The staff function normally has boxes reporting to it in the chart and is positioned opposite an assistant box on the reporting line. Staff function record types have a **Priority** of **0**, and are placed in their own box.
SC	**Succession candidate**	A succession candidate record type represents a person who is a candidate for a specific position currently being held by someone else. Succession candidate record types have a **Priority** of **1**, and are typically placed in a normal box type with other candidates, as well as the current person holding the position they may inherit.

Extracting Your Data

Once you have established person-to-person, position-to-position, or department-to-department relationships, you can begin building your charts automatically from data by mapping data in your HR system to OrgPublisher's input fields.

1. Map the fields in your database that link managers to their direct reports or reporting departments to managing departments to the following OrgPublisher input fields.

   Input Field 1 - **PARENT_BOX_ID**

   Input Field 2 - **BOX_ID**

   You can map an Employee ID field from your database to **BOX_ID** and a Reports To (or Supervisor ID) field to **PARENT_BOX_ID**. This creates an org chart where each person appears in their own box.

2. Define each input record with a default or custom position type in Input Field 4 - **RECORD_TYPE**.

   If you leave the record type blank, all positions in the chart default to **Employee** position types.

3. Map the employee name from your HR system to the **Last Name**, **First Name**, and **Middle Name** fields in the OrgPublisher Input File Layout.

Note: *If your database has only one field for the entire employee name, then map this field to the Last Name field.*

If you are creating a succession planning chart, see the Mapping Succession Planning Fields topic.

Each record can contain information about a person's position or job title. If your database does not store a key or code to identify each job title, you can map the job title field in your employee database to both the **Job ID** field and the **Job title** field in the Input File, or you can leave the **Job ID** field blank.

4. If you want to use multi-level peer display, you must define the level number in Field 18.

5. Map the rest of the fields according to the Input File Layout.

6. Save your comma-separated ASCII text file as an OCB, TXT, or CSV file.

7. Open your text file (example, **MYCHART.OCB**) in OrgPublisher.

   Your org chart is displayed and ready for you to format. When you save the chart, your formatting is stored in a separate template file

with an OTM extension. When you re-import your data and open the chart, the styles and formatting remain unchanged.

Identifying Invalid Comma-separated File Format

When building from data or using API function definitions, found in the OrgPublisher Software Development Kit (OPSDK):

- Ensure that fields that contain a comma, such as last name, are enclosed in quotes.

  Example:
  Incorrect: ,Smith, Jr.,
  Correct: ,"Smith, Jr.",

- Ensure that fields do not contain any quote characters.

  Example:
  Incorrect: ,"Mc"Donald",
  Correct: ,"Mc'Donald",

- Ensure that there are no blank records at the end of the file. Word processors and spreadsheets may inadvertently leave blank lines at the end of the file. The last record in the file should be followed by the end of file marker.

- Ensure that no single field is over 2000 characters in length.

- Ensure that there are no less than 10 comma-separated fields in each input record.

Selecting a Data Source

The New Chart Wizard helps you select the data source from which to create your org chart.

Note: *If you are creating a succession planning chart, see the Mapping Succession Planning Fields topic.*

ODBC database - OrgPublisher establishes a direct connection to any ODBC - compliant database, retains all connection and field mapping information.

XML - OrgPublisher matches data in the XML format to the OrgPublisher input fields. If your XML data file contains an x-schema reference to the Aquire schema, this reference must point to the downloaded Aquire

schema or the Aquire schema must be copied to the directory containing your XML data file.

Text - OrgPublisher uses existing data in a comma-delimited text file for building an organization chart.

Multiple data sources - OrgPublisher allows you to build a single chart from more than one data source, choices include ODBC, XML, and Text.

Blank chart - This option allows you to open a blank chart to build your hierarchy manually.

Unifi style - OrgPublisher imports your Unifi data file (.unifi) in order to publish your chart to your intranet, server, or the Internet.

Creating an Org Chart from ODBC

The New Chart Wizard also enables you to create a chart from a single source, such as text, XML, or ODBC. You can also create a succession planning chart.

1. Open OrgPublisher and select **Run the New Chart Wizard** radio button from the *OrgPublisher* dialog. You can also click **File** from the Main menu then **New**, or click the New button in the toolbar. The *New Chart Wizard* opens.
2. Accept the default selection of Organizational chart and click **Next**. The *Select a data source* dialog opens.
3. Select the **ODBC database** button and click **Next**.
4. Select the **ODBC Data Source Name (DSN)** for your database from the pull-down list, or click **New data source** to navigate to the source file. Click **Next**.

Note: *If you elect to return to this dialog for any reason, you must reenter the DSN information.*

5. Depending on your data source selection, you can select a database table, view, or query that contains the data for your chart. Or, you can select the **Custom SQL** radio button and type your own query. if the data is not correct, click **Back** to connect to the another database. Click **Next**.
6. The *Data preview* dialog lets you verify that you have the right source and that your records contain the appropriate data. Click **Next**.

7. In the next dialog, select the **Use standard OrgPublisher field order** radio button if your database was built for OrgPublisher. Or, select the **Specify custom field order** radio button if you want to sequence your custom fields in a specific order. Click **Next**.

8. If you chose to **Use standard OrgPublisher field order** in the previous step, proceed to Step 11.

9. If you chose to **Specify custom field order**, the *Data preview* dialog enables you to map your field names to the OrgPublisher input layout.

10. Click the pull-down arrow above the field you want to map, and select the appropriate OrgPublisher record name from the pull-down list. The default option is **Do not import** for those fields you don't have to map. For instance, if your database contains fields identified as ParentID or BoxID, these fields will automatically map to the standard OrgPublisher record input field.

    Other mapping options in the list include **Custom Field**, **Parent Box ID**, **Box ID**, **Person ID**, **Position Sequence**, **Level Number**, etc. You can also click **Apply Standard Mapping** if you choose not to map fields manually.

    You will most often use this dialog to identify your custom fields. Duplicate usage of a field type is limited to custom fields.

    If you are creating a succession planning chart, see Mapping Succession Planning Fields for additional information.

    When you finish mapping, click **Next**.

11. You can accept the default in the last dialog to **Launch the style wizard** to format your chart, or you can clear the check box and click **Finish** to open your chart.

Creating an Org Chart from an XML File

The New Chart Wizard enables you to create a chart from a single source, such as text, XML, or ODBC. You can also create a succession planning chart, see Mapping Succession Planning Fields for additional information.

1. Open OrgPublisher and select **Run the New Chart Wizard** radio button from the *OrgPublisher* dialog. You can also select **File** from the Main menu then **New** from the pull-down menu, or click the New button  in the toolbar. The *New Chart Wizard* opens.

2. Select the **XML file** button and click **Next**.

3. Type or **Browse** to the **Chart XML file**. Click **Next**.

4. The *Data Preview* dialog lets you verify that you have the right source and that your records contain the appropriate data. See the Specifying a Custom Field Order procedure for additional information. Click **Next**.

5. You can accept the default in the last dialog to **Launch the style wizard** to format your chart, or you can clear the check box and click **Finish** to open your chart.

Creating a Custom XSLT File

As an alternative to downloading a valid XSLT file from the Aquire web site, you may want to create a custom XSLT file that is valid for your data.

To implement your own schema for translating XML data to OrgPublisher's input format, you will need to add the tag name and file name of your XSLT file to the **XSLTFileList.xml file**. This file is usually located in your **C:\Program Files\OrgPub8\TVXMLCon\XML** directory.

The following code samples are truncated to conform to this document's margin settings. When modifying this code make sure that there are no spaces inserted or this code may not perform properly. If you have any questions about this process, please contact Aquire Support at support@aquire.com.

Sample of original XSLTFileList.xml file

```
<?xml version = "1.0"?>

<OP40FileList>

<urn_schemas_biztalk_org_lawson_com_0q3yhkct_xml>LawsonToOP40
V1.xsl</urn_schemas_biztalk_org_lawson_com_0q3yhkct_xml>

</OP40FileList>
```

Sample of modified XSLTFileList.xml file

```
<?xml version = "1.0"?>

<OP40FileList>

<urn_schemas_biztalk_org_lawson_com_0q3yhkct_xml>LawsonToOP40
V1.xsl</urn_schemas_biztalk_org_Lawson_com_0q3yhct_xml>

<x_schema_myschema_xml>mytoOP40V1.xsl</
x_schema_myschema_xml>
```

</OP40FileList>

Note: *The underscore (_) character must be substituted for period (.) and comma (,) characters.*

Creating an Org Chart from a Text File

The New Chart Wizard also enables you to create a chart from a single source, such as text, XML, or ODBC. You can also create a Succession Planning chart.

1. Open OrgPublisher and select **Run the New Chart Wizard** radio button from the *OrgPublisher* dialog. You can also select **File** from the Main menu then **New**, or click the New button in the toolbar. The *New Chart Wizard* opens.
2. Select the **Text file** button and click **Next**.
3. Type or **Browse** to the **Chart Text File**. Click **Next**.
4. The *Data preview* dialog lets you verify that you have the right source and that your records contain the appropriate data. If your data file includes field names, select the **First row contains column names** check box. OrgPublisher then removes the Field number column headings. Click **Next**.
5. In the next dialog, select the **Use standard OrgPublisher field order** radio button if your database was built for OrgPublisher. Or, select the **Specify custom field order** radio button if you want to sequence your custom fields in a specific order. Click **Next**.
6. If you chose to **Use standard OrgPublisher field order** in the previous step, proceed to Step 9.
7. If you chose to **Specify custom field order**, the *Data preview* dialog enables you to map your field names to the OrgPublisher input layout.
8. Click the pull-down arrow above the field you want to map, and select the appropriate OrgPublisher record name from the pull-down list. The default option is **Do not import** for those fields you don't have to map. For instance, if your database contains fields identified as **ParentID** or **BoxID**, these fields will automatically map to the standard OrgPublisher record input field.

   Other mapping options in the list include **Custom Field**, **Parent Box ID**, **Box ID**, **Person ID**, **Position Sequence**, **Level Number**, etc. Duplicate usage of a field type is limited to custom fields. You can

also click **Apply Standard Mapping** if you choose not to map fields manually.

If you are creating a succession planning chart, see Mapping Succession Planning Fields for additional information.

You will most often use this dialog to identify your custom fields. When you finish mapping, click **Next**.

9. You can accept the default in the last dialog to **Launch the style wizard** to format your chart, or you can clear the check box and click **Finish** to open your chart.

Extracting Data into a Text File

Extract data into a comma-separated text file in the order required by OrgPublisher's Input File.

For example, if your database is on a mainframe, you can extract or query the data and then download it as an ASCII text file to your PC. If the data is not laid out correctly, you must reorder it before you create your org chart.

You can save the comma-separated text file in an ODBC -compliant database, and then establish a database connection with OrgPublisher to reorder the data by selecting the appropriate columns in the *New Chart Wizard*.

Note: *If you are creating a succession planning chart, see the Mapping Succession Planning Fields topic.*

Creating an Org Chart from Multiple Data Sources

The New Chart Wizard also enables you to create a chart from a single source, such as text, XML, or ODBC. You can also create a Succession planning chart.

Note: *Real-time publishing is not available when creating a chart from multiple data sources .*

1. Select **File** from the Main menu then **New** from the pull-down menu.

   You can also click the New button  in the toolbar. The *New Chart Wizard* opens.

2. Select the **Organizational chart** radio button, and click **Next**. The *Select a data source* dialog opens.

3. Select the **Multiple Data Sources** button, and click **Next**. The *Multiple data sources* dialog opens.

4. Click the appropriate button to **Select a Primary Data Source**. Click **Next**.

5. Follow the prompts for the data source you select, **ODBC database**, **XML file**, or **Text file**.

Note: *Web Administration supports opening multiple data base charts (OCB, CSV) as long as those files exist in the **SourceCharts** folder. Web Administration , however, does not support creating multiple data source charts from these file types, neither does it support editing the text file charts using the Data sources dialog.*

6. The next dialog asks you to either accept the default name, **Primary data source**, or type a "nickname" for this data source. Click **Next**.

7. The next dialog verifies that you want to use another data source. Select the **Yes** radio button and click **Next**.

8. The *Multiple data sources* dialog allows you to identify what the additional data source contains.

   If you select **Additional boxes, positions, and persons**, you can also select the **All new positions have the following position type** check box and select the corresponding position type.

   If you select **Additional fields for existing records**, choose the corresponding data element from the **Link to** pull-down list.

   If you select **Succession planning information**, choose the corresponding data element from the **Link to** pull-down list. See Mapping Succession Planning Fields for more information.

   Click **Next**.

9. In the next dialog, click **Select an additional data source** then click **Next**.

10. Follow the wizard prompts to add the additional data source, **ODBC database**, **XML file**, or **Text file**. Click **Next**.

11. Either accept the default name, **Secondary data source 1**, or type a "nickname" for the additional data source. Click **Next**.

12. You can again access another data source by selecting **Yes**, and repeating Steps 4 - 11. Select **No** to complete the wizard.

13. You can accept the default in the last dialog to **Launch the style wizard** to format your chart, or you can clear the check box and click **Finish** to open your chart.

Note: *By design, only the last data source in the list can be deleted.*

Custom fields and associated data are NOT deleted from the chart when you delete a data source. These custom fields, or just the custom field data, must be deleted manually using the Custom Field Properties dialog.

Creating an Org Chart from a Unifi Style

You can import your Unifi data file (.unifi) in order to publish your chart data. The New Chart Wizard also enables you to create a chart from a single source, such as text, XML, or ODBC. You can also create a Succession planning chart.

1. Open OrgPublisher and select **Run the New Chart Wizard** radio button from the *OrgPublisher* dialog. You can also click File from the Main menu then **New**, or click the New button  in the toolbar. The *New Chart Wizard* opens.
2. Accept the default selection of **Organizational chart** and click **Next**. The *Select a data source* dialog opens.
3. Select the **Unifi style** button and click **Next**.
4. In the *Unifi style* dialog, type the connection string to your Unifi style.

   If you need help building the connection string, click **Connection Builder**. The *Data Link Properties* dialog opens at the **Provider** tab. See the Entering Connection String for a Unifi Style Chart procedure. You can also click the **Help** button in this Microsoft operating system dialog for assistance.

   Click **Next**.
5. The next dialog displays the available charts and styles. Select the style you want to import and click **Next**.
6. You can accept the default in the last dialog to **Launch the style wizard** to format your chart, or you can clear the check box and click **Finish** to open your chart.

Choosing Standard or Custom Field Order

When creating a new chart from data, you must choose between a standard field or map to a custom field order.

1. Follow the *New Chart Wizard* dialogs, selecting the data source and database table or query. Click **Next** in the *Data preview* dialog.

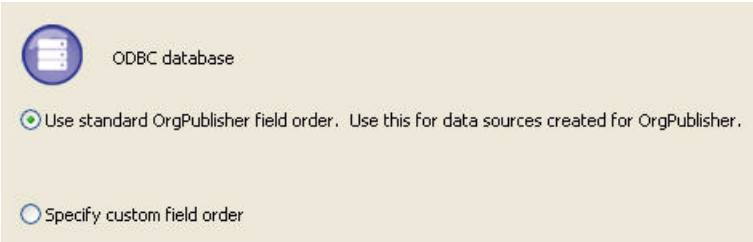

ODBC database
Use standard OrgPublisher field order. Use this for data sources created for OrgPublisher.
Specify custom field order

Figure 98

2. The next dialog defaults to the **Use standard Org Publisher field order** radio button. As noted in this option, you should accept the default only if your database was created with the OrgPublisher Input File Layout in mind. This layout provides information in a specific order, and relies on a person-to-person, position-to-position, or department-to-department relationship. Unique IDs are used for the parent box, individual employees, boxes, jobs, and more. If you accept this default selection click **Next** to finish the wizard.

3. If your database was not designed to follow the OrgPublisher input file layout, select the **Specify custom field order** radio button. Click **Next** to map your field order to work with the OrgPublisher layout.

4. Follow the link in Step 3 to map your field order then complete the *New Chart Wizard*.

Selecting a Database Table, View, or Query

When creating a chart from ODBC, you must select the table, view or query to extract data from the database.

1. Follow the New Chart Wizard dialogs, selecting the ODBC option and navigating to your ODBC database.

2. The dialog that opens next depends on the type of database you select. For example, if you select an SQL database the next dialog may be a login screen for SQL. Click the drop-down arrow and select from a list of tables, views, or queries.

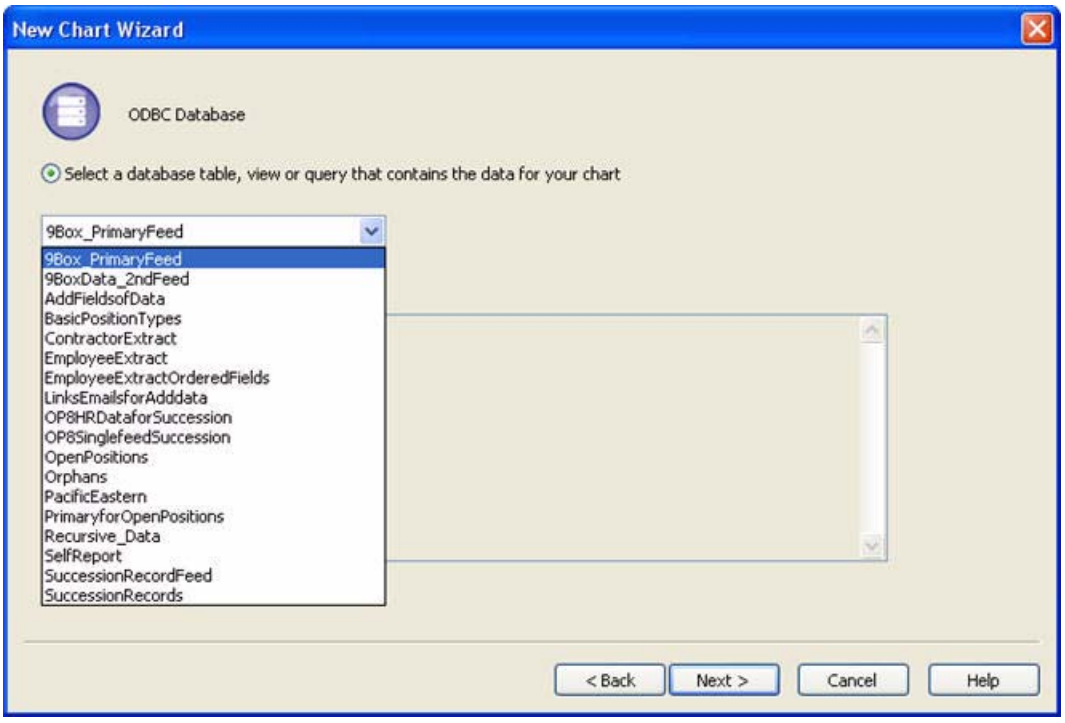


Figure 99

If your database does not already contain tables, views or queries you may have to write your own SQL statement.

3. If you want to write your own SQL statement select the **Custom SQL** radio button and type your query string.

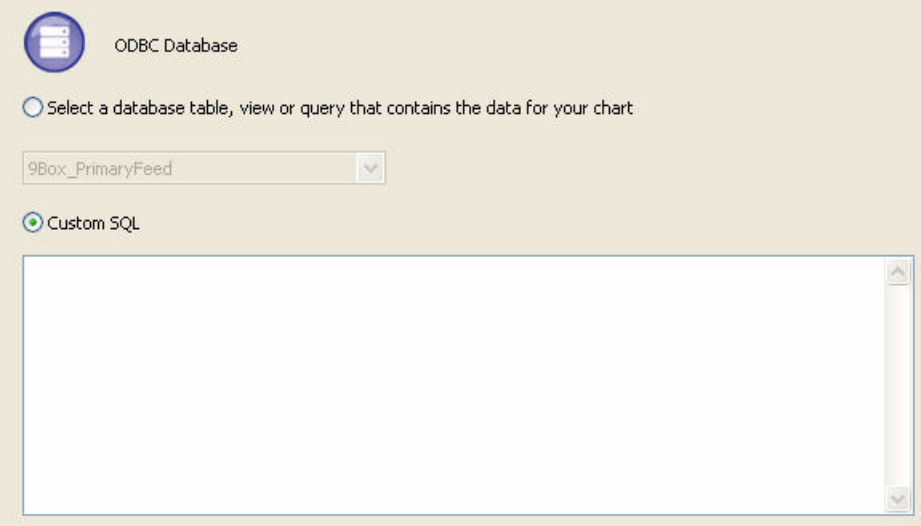


Figure 100

4. You can later modify this statement in the chart by selecting **Data** from the menu then **Manage data sources** from the options list to open the *Data Source* dialog. Click **Connection Info** to open the *Database Connection* dialog.

5. Click **Next** to continue the wizard and create your chart.

Note: *If you are connecting to a Microsoft Excel file, you must create a named range identifying where the data is located within the spreadsheet.*

Mapping to Multiple Field Types

1. You may need to map a single column of data as more than one field type when creating a chart from data. For instance, you have a column of data that contains the Employee Number. You want to use it as input field 5 (**Person ID**) as well as display the field in the chart as a custom field. Scroll down to the last field type option and click **Multiple**. The *Multiple Field Mapper* dialog opens.



Figure 101

2. Click **Add**. The *Multiple Field Mapper* inserts **Custom Field** as the first mapping type.

3. In the **Name** column, click **Custom Field** to display all the available options.

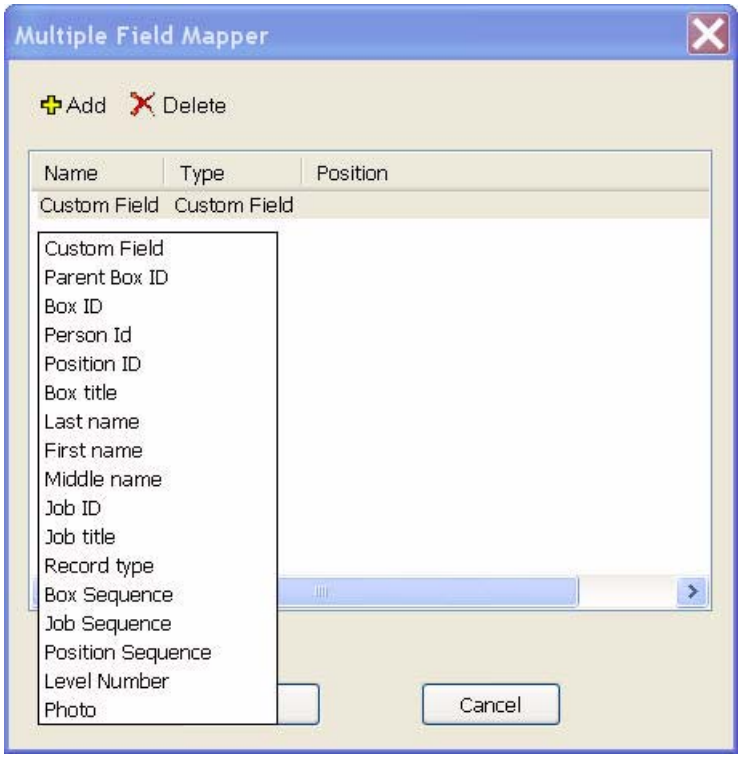


Figure 102

4. Select the field type you want to apply.
5. Click **Add** to insert the second instance of the field.
6. Repeat Steps 3-5 if applicable.

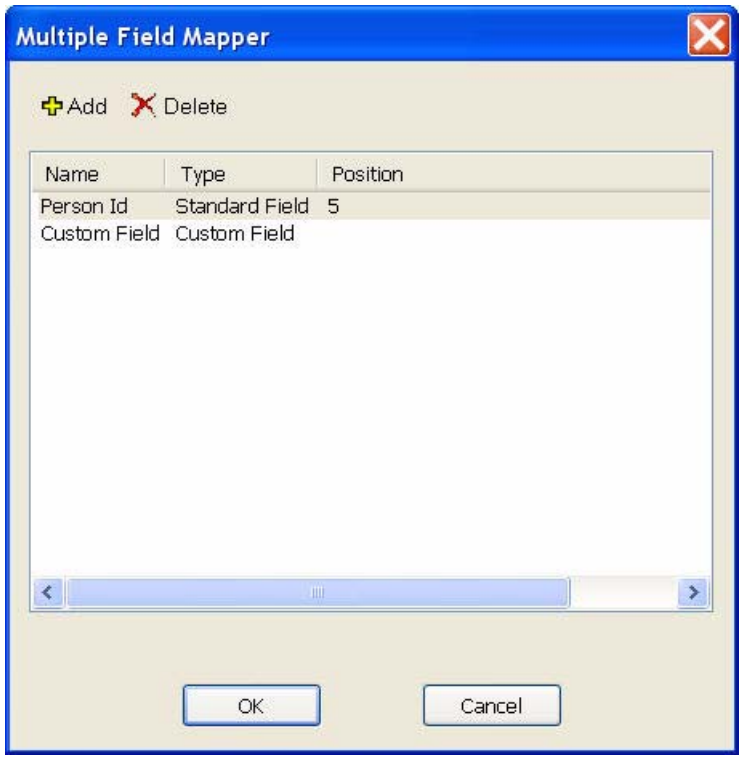


Figure 103

7. Click **OK** when you have finished mapping the field. The mapped column is now labeled as **Multiple**.

8. When you have finished mapping your fields, click **Next** to continue with the New Chart Wizard.

Resolving Reporting Relationship Problems

If you open a chart that contains incomplete or invalid reporting relationships, the *Errors Found in Data* dialog opens when you open your chart. This dialog displays the incomplete hierarchy, or orphan records. The *Errors Found in Data* dialog finds information in the data for **Parent Box ID**, **Box ID**, **Box title**, **Record type**, **ID**, **Last name**, **First name**, and more for each error record.

Note: *The records listed from your input file, and any boxes reporting to these records, will not display in your org chart. Review the records listed to determine the problem.*

1. If you want to quickly open the chart without resolving the relationship problems, you can select the "top of chart " record, for instance the CEO or president box, to display your chart with only the valid records. This represents an incomplete organization.

   The only valid record in the *Errors Found in Data* dialog that can display a blank **Parent Box ID** field is the "top of chart" box, usually the CEO or President of the company, because that box does not report to another box.

   Select a record of, for instance, a manager to display all the boxes that report to that box. However, this closes the **Errors Found in Data** dialog and does not resolve the reporting relationship problem.

   You may see records listed in this dialog that display a **Parent Box ID**. This suggests that the actual record for that box is not in your database, or the box ID is invalid.

   You may see records listed in the dialog that display a blank **Parent Box ID** field. This suggests that these records in your database are incomplete, with no parent box ID recorded.

2. To assist you in resolving errors in your source data, select the records in the list and click **Copy list to clipboard**.

3. Open a Windows application, such as Microsoft Word or Excel.

4. Press **CTRL+V** or click the Paste button  in the toolbar to paste the records. Either save this document or print it so that you can research the invalid data and correct your HR database.

5. Close your chart and correct your database. Once your HR database is corrected, reopen your org chart. The missing records now display and the *Errors Found in Data* dialog does not open if all records have been corrected.

Note: *If the **Messages** option is cleared in OrgPublisher **Options** menu list, the Errors Found in Data dialog does not open even though you may have reporting relationship problems.*

Once you have corrected your data, you can turn off messages in order to increase your processing time.

Addressing Warnings and Error Messages

Message 1

Too few fields in record #, Abort file read?

The **Messages** option under the **Options** menu must be checked for this message to appear. The message is caused by having less than 10 fields in any record within the Input File. The number of the records in error is displayed in the message.

Message 2

records read. Do you wish to continue?

The **Messages** option under the **Options** menu must be checked for this message to appear. This message allows you to stop OrgPublisher reading the Input File at a certain record limit. The following setting determines the number of records read each time before this warning is displayed:

[Settings]

warn after=1000

This setting can only be changed by manually editing the OrgPublisher registry settings. The default setting is to warn after every 200,000 records are read.

Message 3

Warning!

Chart is too wide to be displayed correctly. Please alter the chart style and/or reduce the width and spacing of boxes.

This message occurs if the width of the chart to be displayed is larger than *30,000 characters across*.

To resolve this problem, try changing the chart style by selecting **Format** from the menu bar, then **Chart** from the pull-down menu, and then choose a more compact chart layout in the *Format* dialog.

In addition, try reducing the character width of boxes and the horizontal spacing between boxes. Setting the overall chart font to a smaller font such as Arial 6 point, using the **Font** tab of the *Format* dialog will also reduce the chart width. Using the Drill-up/Drill-down features in OrgPublisher can also solve this problem because it limits the number of organizations levels displayed at any one time. As a last resort, break up your org chart into smaller, more manageable charts.

Message 4

OLE 2.0 initialization failed. Make sure that the OLE libraries are the correct version.

This message is displayed when OrgPublisher is unable to locate a required OLE2 file on your PC.

During the OrgPublisher setup process **OLE2** files are copied to the *Windows System* directory. Check that these files have been installed. Try rebooting your PC and then reinstalling OrgPublisher.

If your PC is connected to a network, ensure that you are able to write to the *Windows System* directory. If you do not have the necessary network access, request that your networking group install the product for you.

Message 5

Failed to allocate space for objectName.

OrgPublisher has run out of available memory. Close OrgPublisher and all other programs. Restart OrgPublisher and open the org chart again. Also, try restarting Windows before running OrgPublisher. If the situation persists, try adding more memory to your PC or reduce the size of your org chart.

Message 6

Warning! The maximum number of organization levels has been exceeded.

The org chart has exceeded 499 levels. This may be caused by an invalid reporting hierarchy.

Please email Aquire Customer Support at support@aquire.com if you suspect your data is correct.

File Types

OrgPublisher potentially creates several types of files that contain different information for your chart.

File Extensions	File Contents
OCP	OrgPublisher published chart; if you are working with an EChart, contains information to contact the EChart server. PluginX - Binary chart/template file combined.
OTM	Template formatting; OTM file is matched to the ODB or OCB file to make the chart file.
HTM	Determines the browser type and invokes the PluginX. Also applicable to EChart, both thin and rich client.
OCB	Chart data ASCII file; comma-delimited text file.
ODB	Database connection file.
DLL	EChart file for both thin client and rich client; contains ISAPI DLL; must be in the same web directory as EChart OCP file.
OCS	EChart file for both thin and rich client security; contains EChart data; must be in the same web directory as the EChart OCP file.
BAT	EChart file for both thin and rich client; batch file that can be used for automated EChart publishing.
OPW	Web Administration file.
ODBX	Multiple sources chart file.

Sorting Boxes

In OrgPublisher you can sort by boxes in the Chart View across rows manually, by box ID, or by a selected field. After remodeling a chart using drag and drop editing, you can select the **Sort by this field** option to sort the chart on box ID left to right.

Note: *Charts saved in previous versions of OrgPublisher open with the original sequencing unaffected. If you choose to sequence by field, this sequencing overrides any previous sequencing and priority choices.*

Charts built from data are always sorted left to right by box ID. The Sort manually option is enabled by default.

1. Select **Options** from the Main menu and **Sort options** from the pull-down list. The *Sorting Options* dialog opens.

2. Select the radio button that describes the sort option you want to use, **Sort manually**, **Sort by Box ID**, or **Sort by this field**.

   Selecting the **Sort manually** option enables you to place boxes where you want them in a row, or place position types, etc. where you want them in a box. Selecting **Sort by Box ID** enables

OrgPublisher to automatically sort boxes by the **ID** in field 2. Selecting **Sort by this field** enables you to select a custom field by which to sort the boxes.

3. If you select **Sort by this field**, click the down-arrow and select the field by which you want to sort, such as **Last name** or **Box title**.

4. Click **OK** to close the *Sorting Options* dialog and apply your sort option.

Note: *Although this section provides information on manually editing a chart, remember that if you want the changes to remain permanent, you must apply the changes to your HR database. When your HR data is refreshed and you open your chart, your manual changes are overwritten.*

Using Auto Build

The Auto Build feature automatically controls how positions are placed in boxes attached to the report-to box. OrgPublisher's former Auto sort option (sorting job titles within a box based on the priority for the position type and a person's last name) is managed with Auto Build. This option:

- Sorts job titles on job ID top to bottom.
- Sorts people on last name within a job title.
- Using Auto Build with Advance Box Layout Editor for formatting follows separate rules.

Auto Build Options

Use Auto Build to place positions within an org chart. These options are effective only in *View Mode*. You can choose from:

Auto Build Options	Description
Normal	The default setting. Each person is in a box because the box IDs are based on the employee ID.
Reports in one box	Managers and direct reports are contained in a single box.
Reports in box below	Managers are in their own boxes above their direct reports, which are contained in a single box.

The options other than **Normal** are useful for org charts using employee ID and supervisor ID as the box ID and parent box ID, respectively.

Note: *Planning charts are always in Build Mode, and do not reflect special formatting, such as multi-level peer display, reports in the same box as their manager, or the advanced box layout settings.*

Selecting an Auto Build Option

1. Select **Format** from the Main menu then **Chart** from the pull-down menu. The *Format* dialog opens to the **Chart** tab.
2. In the **Auto Build Value** field, select the **Auto Build** option for the chart.
3. Click **OK**. OrgPublisher places the positions in the chart as specified.

Managing Data Sources

After you have created a chart from a multiple sources, text, XML, or ODBC, you can manage those sources through the **Data** menu.

Note: *Web Administration supports opening multiple data base charts (OCB, CSV) as long as those files exist in the SourceCharts folder. Web Administration, however, does not support creating multiple data source charts from these file types, neither does it support editing the text file charts using the Data sources dialog.*

1. Click **Data** from the Main menu then **Manage data sources** from the options list. The *Data sources* dialog opens. This dialog displays a list of all databases used to create your chart. You can delete a data source, add a new data source, or modify the properties of a data source.

To Delete a Data Source

2. Select the last data source displayed in the *Data Sources* dialog.

   Click the Delete button 

   to remove the data source from your chart.

Note: *By design, only the last data source in the list can be deleted.*

   A message asks you to verify that you want to delete the selected data source.

3. Click **Yes** to delete the source and return to the *Data sources* dialog.
4. Click **Close**.

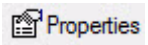
Note: *Custom fields and associated data are NOT deleted from the chart when you delete a data source. These custom fields, or just the custom field data, must be deleted manually using the Custom Field Properties dialog.*

To Add a Data Source

1. Click the New button 

to add another data source to your chart. The New Chart Wizard opens at the *Additional data source* dialog.
2. Follow the wizard prompts to add the data source.
3. Click **Finish** to close the *New Chart Wizard* and return to the *Data sources* dialog.
4. Click **Close**.
   Your chart reflects the new data.

To Modify a Data Source

1. Click the Properties button 

to modify the data fields. The *New Chart Wizard* opens at the *Data preview* dialog.
2. Follow the wizard prompts to modify the data properties.
3. Click **Finish** to close the *New Chart Wizard* and return to the *Data sources* dialog.
4. Click **Close** when you are finished modifying the data sources.
   Your chart reflects the updates.

To Review or Configure Connection Information

1. Click the Connection Info button 

to review or configure your connection information. The *Database Connection* dialog opens.
2. To configure the connection information, click **Configure**. The dialog fields are now enabled for editing.
3. Modify the connection information as needed and click **Verify**.
4. Click **OK** when you have finished configuring the database connection to close the dialog.

Using the Select a Chart to Open dialog

You can choose to add or delete charts, open an existing chart, or modify a chart in Web Administration using the Select a Chart to Open dialog.

- Open OrgPublisher Web Administration in your browser. The *Select a Chart to Open* dialog opens.
- The *Select a Chart to Open* dialog defaults to the detailed list of files. You can change that to view large icons or small icons.

Field	Description
Chart name	The name of the chart in Web Administration.
Type	The file type for the chart in Web Administration, such as text file, or database connection.
Modified by	The login name of the person who last modified the chart in Web Administration.
Modification date	The date and time the chart was last modified in Web Administration.
Lock Status	Indicates whether the chart is **Locked** or **Not locked** in Web Administration.
Locked by	The login name of the person who has locked the chart in Web Administration.
Locked on	The date and time the chart was locked in Web Administration.

- If you want to open a new chart, click **New Chart**. The New Chart Wizard opens. Follow the dialog prompts to create your chart.
- If you want to delete a chart, select the chart from the records list and click **Delete Chart**. A message verifies that you want to delete the record, as you cannot "undo" that action. Click **Yes** to delete or No to cancel the action.
- If you want to import an OrgPublisher chart from a disk drive, click Import. The *Import OrgPublisher Chart* dialog opens. Type or **Browse** to the location of the chart you want to add to OrgPublisher with Web Administration. Click **Import**.

Manually Edit Charts

Note: *Although this section provides information on manually editing a chart, remember that if you want the changes to remain permanent, you must apply the changes to your HR database. When your HR data is refreshed and you open your chart, your manual changes are overwritten.*

Adding Boxes Under an Assistant Box

You can add reports to an assistant box type just as you can to other boxes in the chart. OrgPublisher displays these boxes vertically immediately below the assistant. Assistant boxes dropped on an assistant box display like normal boxes and will not contain the special assistant box formatting.

1. Click and release the Insert person/job button  . (You can also use the Normal box button  .)
2. Move the mouse pointer over the assistant box title or job. Click the mouse. The new box displays directly below the assistant box.

Note: *You cannot add a Partner box to an Assistant box. If you have an Assistant box that has several reporting boxes, you should consider identifying that box as a Staff function box, rather than as an assistant. You can add several reporting boxes to an Assistant box, but since they are all displayed directly below the assistant, more than one or two boxes can make viewing your org chart difficult.*

Only Staff Function position types can reside in a Staff Function box.

Changing a Chart Title

You can change the title of your organizational chart at any time. You can also use the **Chart** tab of the *Format* dialog or select **Format** from the Main menu and **Title** from the options list.

1. Click the chart title text to select it in the Chart View. A red box outlines the title.
2. Click the title again to highlight the text.
3. Type the new chart title and click somewhere in the chart or press **ENTER**. The new chart title displays in the chart.

Changing a Job or Box Title

You can change job and box titles in your chart at any time.

1. Double-click on the box title or job title in the Chart View. The *Rename Box/Job Title* dialog opens.
2. Type the new title over the old one. If you are changing the box title and there are multiple titles existing in the chart, you can also select a title from a drop-down list.
3. Click **OK**. The new title displays in the chart box.

Changing a Name

In OrgPublisher, you can change a person's name by using the Update Person dialog.

1. Double-click the person's name in the *Chart View*, or if a name hasn't been entered, the default text, such as "Manager name." The *Update Person* dialog opens.
2. Type the new name in the **First name**, **Second**, or **Last name** fields.
3. You can also update the **ID** field in this dialog, if required.
4. Click **OK**. The name displays in the chart box.
   In addition, the **ID** field contains the unique ID information necessary to enable the use of multi-relationship icons and EChart security.

Changing Direct Reports to Indirect Reports

Organizations often have people who may report to more than one manager in terms of a project, but who belong to just one manager's department. By default, OrgPublisher displays this type of indirect relationship, or matrix reporting, as a dotted line box and connecting line in the *Chart View*.

Indicating that one person reports to more than one manager is accomplished with multiple records and use of position types.

One box must be designated position type "E" for Employee. Other boxes must be designated position type "I" for indirect report. (Indirect reports are not counted for head count purposes. Indirect report boxes are

displayed with dotted lines around the box, as well as the lines to the report-to box.) When building from data, you need multiple employee records — one for each manager (see sample of data below).

If you are building from data the records should look like the following:

ParentBoxID	BoxID	Box Title	Record Type	ID	Last Name	First Name
Manager 1	1234	xxx	E		Smith	Carol
Manager 2	1234a	xxx	I		Smith	Carol
Manager 3	1234b	xxx	I		Smith	Carol

You can modify the display for indirect boxes and connecting lines using the Format menu option. In addition, you can add multi-relationship icons to boxes with indirect reports.

1. Verify that you are in *Build Mode* then double-click on the name in the chart that you want to change from a direct report to an indirect report. The *Update Person* dialog opens.
2. Click **Indirect Report** in the **Position type** column.
3. Click **OK**. The box and connecting line now display in the chart with a dotted line, indicating an indirect reporting relationship.

   If you change an assistant from a direct to an indirect report, the internal record type also changes, from **A** (Assistant) to **IA** (Indirect assistant).

Copying Job Titles

You can copy job titles and paste them to other boxes in the chart.

1. Press and hold the **CTRL** key. Press and hold the left mouse button over the job to copy.
2. Drag the pointer to the new box or job title. Release the mouse button and then the **CTRL** key. The job title is inserted below the selected location.

   OrgPublisher automatically inserts an open position below the job title.

Deleting Chart Components

You can manually delete chart components in OrgPublisher, such as people, job titles, or boxes while you are in *Build Mode*.

Delete a box from a chart:

1. Select the box title text.
2. Press **DELETE** on your keyboard or right-click and select **Delete** from the options list. You can also select **Edit** from the Main menu then **Delete** from the pull-down menu. The selected box and subsidiary boxes are removed from the chart.

Delete a Job title from a box:

1. Select each person under the job title in the chart box.
2. Press **DELETE** on your keyboard or right-click and select **Delete** from the options list. You can also select **Edit** from the Main menu then **Delete** from the pull-down menu. OrgPublisher automatically inserts an open position.
3. Select the open position. Press **DELETE** on your keyboard or right-click and select **Delete** from the options list. You can also select **Edit** from the Main menu then **Delete** from the pull-down menu. The job title is automatically removed. If the deleted job title is the only one in the box, the box is also removed.

Delete a person from a box:

1. Select the person's name in the chart box.
2. Press **DELETE** on your keyboard or right-click and select **Delete** from the options list. You can also select **Edit** from the Main menu then **Delete** from the pull-down menu. The person and any custom fields for that person are removed from the chart.

   If a deleted person is the only one under a job title, OrgPublisher replaces the person's name with an open position.

Delete an Open position from a box:

1. Select the open position in the chart box.
2. Press **DELETE** on your keyboard or right-click and select **Delete** from the options list. You can also select **Edit** from the Main menu then

Delete from the pull-down menu. The open position and any custom fields for the position are removed from the chart. If no other person exists for a job title, deleting the last open position also deletes the job title.

Drilling Through Chart Levels

If you want to display only a few levels within your chart, you can use OrgPublisher's Drill-up/Drill-down feature. You can set the number of levels that are displayed from the *Custom levels* dialog on the toolbar or from the *Style Wizard* while creating a style for your chart. This feature is available in both the OrgPublisher application and in a published chart in a browser.

Drill-up and drill-down buttons are arrows that are placed above or beneath boxes to indicate there are chart levels above or below them. Click the arrows to move to other levels. Unless you change it, you move up or down through the chart the number of levels shown in the *Custom levels* dialog on the toolbar. Changing the number of levels to drill up is useful when used with the Set Top of Chart feature.

You can customize drill buttons to make your charts more cosmetically appealing or to better match your corporate document style.

Note: *Drilling through a real-time chart automatically updates the chart.*

To move up and down through the chart, set the top of chart and then set the number of chart levels to display. You must show a minimum of two custom levels.

Drilling tasks include:

Selecting Drilling Options

Showing a Portion of the Chart

Setting the Top of the Chart

Going to the Top of the Displayed Chart

Showing the Entire Chart

Editing an embedded org chart

You can edit linked or embedded charts from within the target application.

1. Double-click in the object to edit. The OrgPublisher toolbar and editing area appear.
2. Make changes to the object using OrgPublisher's editing tools.
3. If the chart is embedded, click outside the chart. The application's toolbar refreshes. Save the changes.
4. If the chart is linked, select **File** from the OrgPublisher Main menu then **Save** from the pull-down menu. Exit to return to the original application.

Editing the Style Bar Label

You can edit the label displayed in the Style Bar by right-clicking on the bar or using the View menu option. The new text pre-pends the existing text.

Note: *This option is not available if the **Show styles in tabs** option is enabled.*

1. Right-click on the Style Bar and select **Style Selector button** then **Edit label** from the options list. The *Style button label* text box opens.
2. Type the label name and click **OK**. Or, click **Cancel** to close the text box without modifying the label.

   You can also select **View** from the main menu then **Toolbars**, **Styles Toolbar**, **Style selector button** and **Edit Label** from the options list. The *Style button label* dialog opens. Type the label name and click **OK** or click **Cancel** to close the text box without modifying the label.

Note: *The Edit Label option in both the Style and group selectors adds text in front of the existing label name. It does not overwrite it.*

Embedding an Org Chart in a Document

You can embed a chart in another COM automation-compliant document. You can also use Previewing a Wall Style Chart to copy a modified chart.

You can also copy the print preview into Microsoft PowerPoint, and open the search results in Microsoft Excel.

1. In OrgPublisher, save the chart to be embedded.
2. To select a box and all its reports, for instance the top box in the chart hierarchy, click on the **Box title**.
3. Select **Edit** from the Main menu then **Copy** from the pull-down menu.
4. Open the target application and document, such as Microsoft® Word for Windows.
5. In the target document, select the point to insert the OrgPublisher chart.
6. In the target application, select **Edit** from the menu bar then, in the target application, select **Paste** from the pull-down menu. A copy of the chart displays in the document.

Going to the Top of the Displayed Chart

You can return to the top of the current chart level in the Chart View after you have scrolled to a specific box or after you have performed a search.

- Select **View** from the Main menu then **Go to top of displayed chart** from the pull-down menu.
- You can also use the Go to top of displayed chart button  from in the toolbar.

OrgPublisher displays the box at the top of *the current drilling level* and its reporting boxes.

Inserting a Chart Title

When you insert the first box in a new chart, the text "Box 1" is automatically inserted and selected for you to add the box name and becomes the chart title. The text you type displays for both the box and the chart. When you insert or type a title, the chart title remains the same regardless of which portion of the chart is displayed.

A planning chart ordinarily displays an existing chart title, which you can modify.

1. Right-click the chart title. Click again to clear **Auto Title**. The text "Chart Title" appears.

2. Double-click the text and type the title of the chart. Press **ENTER**.
3. Save the chart.

Or

Double-click on an existing chart title and type a new title.

Inserting a Person/Job Box

When you create a chart, you must insert a box before you add any other components. This box must contain a person and a job. To insert these two components at the same time, select the Person/Job box button from the Insert toolbar. You can also add the person and job chart components individually.

You can also see the Inserting the First Box and Person in a Chart procedure in the Getting Started with OrgPublisher section of this book.

Inserting Additional Person/Job Boxes

Once you have inserted the first box into your chart, you can begin building your chart levels by adding additional boxes.

1. Click and release the Insert Person/Job Box button in the Insert Toolbar.
2. Move the pointer over the box to which the new person/job box will be reporting and click to insert a person/job box beneath the box you selected.
3. Type over the **Box title**, **Job title**, and **Name** text with the appropriate for the person for the new box.

Inserting Multiple Person/Job Boxes

Once you have inserted your first box into your chart, you can add several boxes at once.

1. Press and hold the **CTRL** key. Click and release the Insert Person/Job Box button in the Insert toolbar.

2. Still pressing the **CTRL** key, move the pointer over each box under which you want to place a new box. Click the mouse once for each box you want to insert.

3. To insert the last box, release the **CTRL** key and click the mouse over the last box under which the new box will be inserted.

Inserting a Staff Function Box

Note: *Only Staff Function position types can reside in a Staff Function box.*

Unlike the process of inserting other chart components from the OrgPublisher toolbar, inserting a staff function box to an existing chart requires that you first create a staff function position type.

If you are working with an empty chart, the position type is already available in the Position Type Wizard. The actual box type does not contain special formatting by default, but you can format the box to your specifications.

1. Once the position type is created, you add a box with a person and job into the chart where you want to place the staff function.

2. Double-click on the name field to open the *Update Person* dialog and select the **Staff Function** position type.

3. The staff function box title displays and the box may be repositioned. Double-click on **Staff Function** to change the box title. If you add reports to this box, a drill-down button displays and you must drill to view those reporting boxes.

Inserting Assistant Boxes

An assistant is a special type of box that is inserted below and to the right of a selected box. If you insert more than one assistant box, these boxes alternate from the right and then to the left of the reporting box. The text "Assistant Box" followed by the number of the box in the chart, is placed into the box as the box title.

Note: *You can add reports to assistants in OrgPublisher, enabling you to show one level of reporting boxes.*

Inserting and labeling an Assistant box

You can add one or more assistant boxes in your org chart. Multiple jobs and people can be placed in an assistant box.

1. Click and release the Insert Assistant button on the Insert Toolbar.
2. Move the mouse pointer over the box title or job under which the assistant box will be inserted. Click the mouse.
3. The assistant box is inserted below and to the right.
4. Type a title for the assistant box.

Inserting multiple Assistant boxes

Multiple assistant boxes can be placed under a box, and multiple jobs and people can be placed in an assistant box. Multiple assistant boxes inserted under the same box alternate from right to left.

1. Press and hold the **CTRL** key. Click and release the Insert Assistant button in the Insert toolbar.
2. Still pressing the **CTRL** key, move the pointer over each box title or job under which the assistant boxes will be inserted.
3. Click the mouse for each assistant you want to insert.
4. To insert the last assistant box, release the **CTRL** key and click the mouse over the last box title or job.

Inserting Jobs

A job is a descriptive title for an employment position. You can insert as many jobs as you want into one or more boxes. You can do this by either inserting the box and job separately, or adding them at the same time by using the Person/Job box button. The text "Job Title" followed by the number of the box in the chart displays. OrgPublisher places text for the employee, manager, or other jobholder below the job title.

When you manually select the position type for a job, each job you insert afterwards is for that position type until you change it or select the automatic assignment of position types. For example, if you insert a job and select an open position type, the jobs you insert afterwards are all for open positions.

Inserting and labeling a job

1. Click and release the Insert Job button  on the Insert Toolbar.
2. Move the mouse pointer over the box title or job under which the new job will be inserted. Click the mouse. The text **Job Title** and **Employee name** are inserted in the box.
3. Type the name of the job and employee.
4. Use one of the following methods to assign a position type.
   - Select **Insert** from the Main menu then **Select position type** from the pull-down menu. The *Select Position Type for Insert* dialog opens.
   - Make sure the **Automatically assign this Position Type** check box is marked. When you drop a job on a box title, a manager will be created. When you drop a job on a manager title, an employee will be created.

Or

   - Select **Insert** from the Main menu then **Select position type** from the pull-down menu. The *Select Position Type for Insert* dialog displays.
   - Select the **Insert** using this **Position Type** check box and click on the position type you want to insert, for example Contractor. All of the jobs that you insert are for contractors until you change the position type.
5. Click **OK**.

Inserting multiple jobs

1. Press and hold the **CTRL** key. Click and release the Insert Job button  in the Insert toolbar.
2. Still pressing the **CTRL** key, move the job pointer over the box title or job under which the new job will be inserted. Click the mouse.
3. To insert the last job, release the **CTRL** key and click the mouse over the last box or job title under which the new job will be inserted.

Inserting Logos

OrgPublisher enables you to insert your company logo into your org chart. The logo displays at the top of the chart in the Chart View, either to the left or right, and appears on every page or window of your chart. You can

also insert a logo as a watermark or background in your chart, or insert special graphics or instructions instead of a logo. Valid file types are **GIF**, **JPG**, **TGA**, **PCX**, and **DIB**.

Note: *The Logo Wizard inserts one logo per chart, across all styles .*

1. Click the Logo Wizard button  in the Wizard View or select **Insert** from the Main menu then **Logo** from the pull-down menu. You can also select **Tools** from the Main menu then **Logo Wizard** from the pull-down menu. If you are modifying an existing logo, right-click on the logo. The *Logo Wizard* opens.
2. Type or **Browse** to the **Logo file name**. Click **Next**.
3. If you are deleting a logo, just delete the file name from this field. Click **Next**, then **Finish**.
4. To add a logo to your chart, select the alignment you want for your logo from the drop-down **Alignment** list.
5. Select the **Show Logo** check box if you want the logo displayed. (You may create styles that will not display the logo.) A preview of the logo is displayed. If the logo is correct, click **Finish**.

   Click **Back** at any time if you need to change the logo or graphic, then repeat these steps and click **Finish**.

Inserting Normal Boxes

A normal box is one of three types of boxes that you can insert into your chart. It contains only the box title field and is always added directly below the box it reports to.

You can also see the Inserting the First Box and Person in a Chart procedure in the Getting Started with OrgPublisher section of this book.

Inserting a single box

1. Click and release the Insert Box button  on the Insert Toolbar.
2. Move the mouse pointer over the box title under which the new box will be inserted. Click the mouse.
3. Type a title for the box.

Inserting multiple boxes

1. Press and hold the **CTRL** key. Click and release the Insert Box button  in the Insert toolbar.
2. Still pressing the **CTRL** key, move the pointer over each box title or job under which the new boxes will be inserted.
3. Click the mouse for each box you want to insert.
4. To insert the last box, release the **CTRL** key and click the mouse over the last box title or job.
5. Type the box titles for each box.

Inserting Open Positions

Open positions are positions in your organization that are not presently filled. Open positions retain the position type already assigned to the box , whether that is a manager, employee, etc. You can format and track open positions separately from the filled positions in your chart, as well as drop them on box titles, jobs, or other people. When you drop an open position on a box title, a new job title is automatically created for the open position.

Inserting an Open position

1. Click and release the Insert Open Position button  on the Insert Toolbar.
2. Move the pointer over the box title, job, or person under which the open position will be inserted.
3. Click the mouse. The text "Open position" displays in the box.

Inserting multiple Open positions

1. Press and hold the **CTRL** key. Click and release the Insert Open Position button  on the toolbar.
2. Still holding the **CTRL** key, move the pointer over each box title, job, or person under which the new person will be inserted. Click the mouse.

3. To insert the last person, release the **CTRL** key and click the mouse over the last box title, job title or person.

Inserting Partner Boxes

OrgPublisher depicts the equal yet independent relationship of a business partner by inserting and connecting a partner box on the same level and to the right of the box on which it is dropped. Multiple jobs and people can be placed in a partner box. When you insert a partner, the box number is shown as the box title.

Inserting and labeling a Partner

1. Click and release the Insert Partner button  on the Insert toolbar.
2. Move the mouse pointer over the box title or job by which the partner box will be inserted.
3. Click the mouse. The partner box is inserted to the right.
4. Type a title for the partner box.

Inserting multiple Partner boxes

Multiple partner boxes can be placed to the right of a box.

1. Press and hold the **CTRL** key. Click and release the Insert Partner button  in the Insert Toolbar.
2. Still pressing the **CTRL** key, move the pointer over each box title or job by which the Partner boxes will be inserted. Click the mouse for each partner box you want to insert.
3. To insert the last partner box, release the **CTRL** key and click the mouse over the last box title or job.

Inserting People

People are the employees, managers, and other personnel in your chart. One person is automatically inserted whenever you place a job in a chart. Additional people can be dropped on box titles, jobs and other people. When you drop a person on a box title, a manager is created. If you already have an employee position type in that box, OrgPublisher displays

both positions. When you drop a person on a job title, the person inherits the characteristics of the job.

When you drop a person on another person, the new person inherits the existing person's job title, and the new person's name is placed directly below the name of the existing person.

Inserting and naming a person

1. Click and release the Insert Person button  on the Insert Toolbar.
2. Move the mouse pointer over the box title, job, or person under which the new person will be inserted. Click the mouse.
3. Type the name of the person.

Inserting multiple people

1. Press and hold the **CTRL** key. Click and release the Insert Person button  in the Insert toolbar.
2. Still pressing the **CTRL** key, move the pointer over each box title, job, or other person under which the new person will be inserted.
3. Click the mouse for each person you want to insert.
4. To insert the last person, release the **CTRL** key and click the mouse over the last box title, job title or person.

Inserting Photos

In OrgPublisher you can insert photos in your chart boxes in the Chart View. You can also insert graphics into your chart the same way as photos. The accepted file formats are **GIF**, **JPG**, **TGA**, **PCX**, and **DIB**. In addition, you can display photos in the Profile View.

Before you insert any photos or graphics, you should:

- Move all of your picture files into one directory to prevent selecting a different path or URL for each photograph you insert. By keeping all of your photos in one directory, you can type the base URL or path for photos in the field, **Base photo file path or URL** in the Photo Wizard, and it is saved for future photo insertions.

- Set a default size for your photos. If you insert a photo that is larger than the chart box, the box automatically widens to fit the photo. The width of a chart box is the same for all boxes in the chart, which means that all of the boxes in the chart change to the same width as the box with the photo.

Once you have moved all of your photos and graphics to the same directory and have modified them to be the same size, run the *Photo Wizard*.

Insert a photo

1. Right-click on a name in the chart if you are working in a planning chart. Select **Photo Wizard**. You can also click and release the Insert Photo button  on the Insert Toolbar. Move the mouse pointer over the box in which the photo will be inserted. Click the mouse. The Photo Wizard opens.
2. Type or **Browse** to the **Photo file name**.
3. Type or **Browse** to the **Base photo file path or URL**. If you browsed to the photo file name, the base path automatically displays in this field. The base file path or URL is the path to the directory where the photos or graphics are saved, the lowest level of the path to the directory where the linked document is saved, such as **file://servername/profiles/**.

Note: *If a full path is passed in with a photo file in field 15, the base URL is overridden and the full path name is used. You must include the trailing forward slash (/) in the base URL.*

4. A preview of the photo is displayed. If the photo is correct, click **Finish**. OrgPublisher inserts the photo or graphic into your org chart. Click **Back** if you need to change the photo or graphic, then repeat these steps and click **Finish**. The photo displays in the selected box.

Moving Boxes

You can move boxes from one location to another in your chart. See the Moving Boxes in Print Preview section of this document if you want to temporarily move boxes in order to print your chart.

1. Press and hold down the left mouse button  over the box title. The box and all reporting boxes are selected.

2. Drag the box pointer to the new top box and drop it on the top box.

3. You can also drag and drop to rearrange boxes on a horizontal line without changing the top box. Select a box and then drag it to another location at the same level.

Moving Boxes with Cut and Paste

In previous versions of OrgPublisher, if the user right-clicked and cut a box, the box disappeared from the chart. The box/span of control remains in the chart with lines drawn through. It will stay in its current position until the user selects a box to paste (move) the cut box or span of control. If the user changes their mind, they can right-click on the selected box or press the **ESC** key and it will no longer be in a “cut” status.

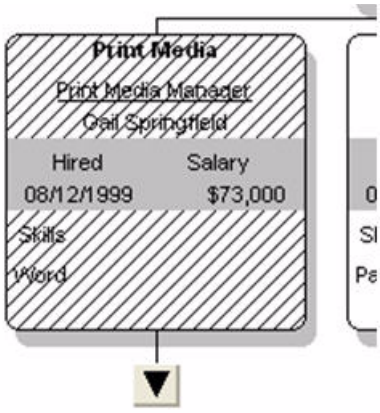


Figure 104

Moving Indirect Reports

Indicating that one person reports to more than one manager is accomplished with multiple records and use of position types. Indirect reports, also referred to as matrix reporting, are not counted for head count purposes. Persons, jobs, and boxes defined as indirect can be moved like other chart components.

If an indirect report is dropped on a job title or another name, the indirect report inherits the new reporting relationship. If an indirect report is dropped on a box title, the indirect report is moved to that box and remains an indirect report. One box must be designated position type "E" for Employee. Other boxes must be designated position type "I" for Indirect Report.

1. Press and hold down the left mouse button over the indirect report you want to move.
2. Drag the cursor to the new box or person and release the mouse button. The indirect report and associated fields, including the multi-relationship icon, if used, are inserted below the selected location. Indirect report boxes are displayed with dotted lines around the box, as well as the lines to the box.

When building from data, you need multiple employee records — one for each manager (see sample of data below). The records should look like the following:

ParentBoxID	BoxID	Box Title	Record Type	ID	Last Name	First Name
Manager 1	1234	xxx	E		Smith	Carol
Manager 2	1234a	xxx	I		Smith	Carol
Manager 3	1234b	xxx	I		Smith	Carol

Moving Jobs

You can move jobs from one location to another in your chart.

1. Press and hold down the left mouse button over the job you want to move.
2. Drag the cursor to the new box title or job title, and release the mouse button. The job title and associated people and custom fields are inserted below the selected location.

Moving People

You can move people from one location to another in your chart.

1. Press and hold down the left mouse button over the person's name.
2. Drag the cursor to the new box title, job title, or name, and release the mouse button. The person and any custom fields associated with the person are inserted below the selected location.

   When you drop a person on a job title or another person, the moved person inherits the new job title.

   When the last person is moved from a job title, OrgPublisher creates an open position under that title.

Selecting Drilling Options

1. Select **View** from the Main menu then **Drill-up/Drill-down** from the pull-down menu. An arrow displays next to the option to indicate that drilling is enabled.

   You can also click on the Drill-up/Drill-down button  in the toolbar, or right-click in the chart area and choose **Drill-Up/Drill-Down** from the options list.

2. To turn off the drilling option, select **View** from the Main menu then click on the arrow next to the **Drill up/Drill down** option to clear it.

   You can also customize the look of the drill buttons.

Setting the Top of the Chart

When you set the top of chart for the current style, the selected box and reporting boxes are shown in the Chart View. To set the top box in the chart style:

1. Click on the **Box title** you want to display as the top of your chart.
2. Select **View** from the Main menu then **Set Top of chart** from the pull-down menu.

   You can also use the Set top of chart  button in the toolbar.

OrgPublisher displays only the selected box and reporting boxes in both the *Chart View* and Tree View for the current style.

Head counts in the Status Bar are adjusted to reflect only the portions of the chart that are shown.

Undoing Changes

If you make a change in your chart, then decide that you do not want to keep the change, you may be able to reverse, or undo that change. You can undo most content-related changes, such as adding, deleting,moving, and copying information.

Formatting changes, such as changes to box style, text size, or the color of chart components cannot be reversed.

Undo a Content Change

- Click the Undo button  in the Main Toolbar.

Or

- Select **Edit** from the menu bar, then **Undo** from the pull-down menu.

Using Click and Drag Scrolling

When the mouse cursor sits over a blank area in the Chart View, the cursor changes to a hand icon  . Using the click and drag scrolling feature is another way to navigate through a large chart. This option is always enabled and cannot be turned off.

- Click and hold down the mouse button. The hand closes  and allows you to scroll through the chart levels by dragging or moving the mouse wheel in the direction you want the *Chart View* to move.

  For instance, if you want to see the bottom of a chart level, you want the *Chart View* to move up. Click the hand in the background of the view and drag upwards.

OrgPublisher 9 Scrolling Enhancement

Chart scrolling is now updated with more of an iPod® scrolling feel. As you drag to move a chart, it will appear more as a “toss.” As you release the mouse, the chart continues to move with a gradual slow down to it’s new position.

Create and Use Custom Fields

Note: *Although this section provides information on manually editing a chart, remember that if you want the changes to remain permanent, you must apply the changes to your HR database. When your HR data is refreshed and you open your chart, your manual changes are overwritten.*

Fields 50 - 64 are standard succession planning custom fields provided by OrgPublisher. These labels cannot be modified.

Adding a Custom Field

You can place custom fields directly below box titles, job titles or peoples' names. Custom fields added below box titles contain information pertinent to the whole department or team that the box represents. Custom fields added below a job title contain information about that job. Custom fields added below a person contain specific information about that person or the position they hold.

You can also add custom fields with the Custom Field Wizard.

Note: *If the charts you are comparing do not contain a custom Position ID type, OrgPublisher uses the ID in field 5 from the Input File Layout. If neither exist, an error message appears and the comparison does not occur. In addition new or renamed custom fields will not match when comparing harts and will not be included in the change report.*

Planners cannot add new custom fields when working in OrgPlan.

1. Select **Data** from the menu bar, then **Custom Field Properties** from the pull-down menu. You can also use the Custom fields button  in the toolbar. The *Custom Field Properties* dialog opens.
2. Position the cursor where you want to add the new custom field, either somewhere within existing fields, or at the end. Click **Insert**. If you are inserting a field within the list of existing fields, a message dialog verifies that this is what you want to do.
3. Enter the field name in the **Field label** column.
4. Press the **TAB** key to move to the **Type** column and select the type of custom field you are adding, for instance **Text**.

Custom Field Type	Descriptipn
Text	Alpha/numeric field that displays company information like phone numbers, email addresses, etc.
Hotspot	Displays whatever label or text you enter and links to a destination URL or path you have assigned in the Hotspot Wizard.
Numeric	Any field containing numbers only for calculating data; displays information such as hours of training and years of employment.
Currency	Displays monetary values, such as a department's budget, that can be summarized.
Count	Includes a position type in the head count total or a head count by position type that can be totaled.
Summary	Calculates summaries for a numeric custom field, such as: **Sum** - Total T & E expenses. **Average** - Years of employment. **Minimum** - Training hours. **Maximum** - Sales per salesperson. **Percentage** - Managers to employees.
Average	Numeric summary field used to display the average derived from a calculation of two or more numeric fields.
Minimum	Numeric summary field used to display a minimum number derived from a calculation of two or more numeric fields, for example, a minimum salary range for a specific job.
Maximum	Numeric summary field used to display a maximum number derived from a calculation of two or more numeric fields for example, a maximum salary range for a specific job.
Percentage	Numeric summary field used to display a percent derived from a calculation of two or more numeric fields.
Date	Displays a date field in a specific format.
Email	Displays an active link to an email address message.

Note: *OrgPublisher looks for the first custom field of Email type when sending email to a group. If you decide to use more than one email address in your chart, the primary email must be first in the custom field sequence order.*

OrgPublisher does not change the value of numeric fields you import. For instance, if you import 341.00, that's what the number is in OrgPublisher. If you import 341, that's what OrgPublisher uses. Formatting cannot change the value of the data you import.

5. If you selected a numeric, currency or count field type, press the **TAB** key to move to the **Calc Field** and select the numeric field on which to do the calculation.

6. Press the **TAB** key to move to the **Population** column and select the position types, total head count, or planned head count to be included in your calculation.

7. Press the **TAB** key to move to the **Assigned To** column. The *Update Assigned Custom Fields* dialog opens. Select the position types you want to assign the custom field to, such as **Manager**, **Employee**, or **All Position Types**.

8. Choose where you want the field to display, **Box title**, **Job title**, or **Name**. Click **OK** to accept your changes and close the text box.

   The **Sample** field displays the contents of the first custom field for this **Type**.

   The **Seq** field displays the OrgPublisher Input File record sequence for that custom field.

9. Click **Apply** or **Close**.

Note: *In OrgPublisher Premier, the Summary Wizard inserts placeholders, if necessary, which display in the Custom Field Properties dialog. These fields within OrgPublisher, occupy sequences 20 -25, and are designated as field types other than summaries, such as Text, Hotspot, or Email. As you create summary fields, OrgPublisher starts placing them in sequence 26.*

When importing numeric fields, make sure that you do not use any leading symbols, such as dollar signs. Also, verify that decimal places are set the way you want them prior to importing those fields into OrgPublisher.

Changing the Contents of a Custom Field

You can modify the contents of a custom field at any time.

1. Double-click on the contents of the field in the chart box to select it for editing.

2. Type new field information and either press **ENTER** or click elsewhere in the Chart View. The new information displays in the box.

Changing the Custom Field Label

You can change the custom field label, or name, within the body of the chart, or by using the *Custom Field Properties* dialog. Custom field labels change in all the views.

1. Double-click on the custom field label in the Chart View.
2. Type the new name and press **ENTER**. The label is changed throughout the chart.

Or

1. Select **Data** from the menu bar, then **Custom Field Properties** from the pull-down menu. You can also click the Custom fields button  in the toolbar. The *Custom Field Properties* dialog opens.
2. Double-click in the **Field label** to highlight the current field name.
3. Type the new name and click **Close** or **Apply**.

Designating Custom Fields as Not Searchable

With OrgPublisher you can designate custom fields as not searchable in the published chart. End users will still be able to see these fields in the chart, but will not be able to conduct a search using that data.

Note: *Published real-time charts use IIS security only. Custom field, group, and styles security do not apply.*

Working in OrgPlan, planners cannot add or delete custom fields. The Administrator maintains control over the custom fields to use in the planning chart.

1. Select **Data** from the Main menu then **Custom field properties** from the options list. You can also click the Custom fields  button in the toolbar. The *Custom Field Properties* dialog opens.
2. Select the custom field you do not want end users to find when conducting a search in the published chart by clicking on the gray cell next to the custom field name.
3. Click **Security**. The *Custom Field Security* dialog opens.
4. The check box at the top of the dialog determines if the field is searchable in the Search View and *Search* dialog. Select the check box if you want to allow end users to search on this field name. Clear

the check box if you do not want to allow end users to search on this field name.

If you are publishing your chart as a secured EChart, you can also secure customs fields. See the Securing an EChart Custom Field procedure for details.

5. Click **OK** to accept the change and return to the *Custom Field Properties* dialog.

6. Click **Apply** to accept the change in the current chart and continue to work in the dialog. Click **Close** to exit the *Custom Field Properties* dialog.

Note: *Keep in mind when you choose to show or hide fields that all information you can view in the OrgPublisher chart or search results list is also displayed when you copy the chart to Microsoft PowerPoint or the search results to Microsoft Excel.*

Making a field not searchable does not hide it in the chart or other views.

Displaying a Custom Field

The **Assigned To** field in the *Custom Field Properties* dialog determines where the custom field is displayed in the chart. EChart field security, such as securing a field hierarchically or by group, also affects whether or not end users can view custom fields .

Note: *Planners can modify any data fields displayed in the Chart View. Data fields you, the administrator, want to keep in the chart, but do not want modified can be displayed in the Profile View. And since planners cannot add or delete custom fields, you still maintain control over the custom fields you decide to use in the chart.*

1. Select **Data** from the Main menu then **Custom Field Properties** from the pull-down menu. The *Custom Field Properties* dialog opens.

   You can also use the Custom fields button  in the toolbar.

2. Position the cursor on the custom field, and press the **TAB** key to move to the **Assigned To** column.

3. Select the position types for this custom field and click **Apply**.

Displaying the Properties of a Custom Field

1. Right-click on the data content of a custom field. Select **Custom Field Properties** from the drop-down menu. The *Custom Field*

Properties dialog displays with a list of the custom fields for your chart. You can also click the Custom fields button  in the toolbar.

2. If you want to add or delete a field, click on an existing field in this dialog and then click **Insert** to add a custom field above the one you selected, or click **Delete** to erase a custom field.

Note: *In OrgPlan, planners can modify any data fields displayed in the Chart View. Data fields you, the administrator, want to keep in the chart, but do not want modified can be displayed in the Profile View. And since planners cannot add or delete custom fields, you still maintain control over the custom fields you decide to use in the chart.*

If you want to modify properties, click on the existing property data and either type over or select a new value from the drop-down list.

3. Click **Apply**.

4. If you are just reviewing the property values, click **Close** when you are finished.

The properties in this dialog include:

Properties	
Field label	The name of the custom field.
Type	The type of custom field, for example a text field or a currency field.
Calc Field	The numeric custom field that is used when a summary field is calculated.
Population	The position types or groups included for the custom field.
Assigned To	The position types that will display the custom field. A custom field must be assigned to a position type to be displayed in the chart.
Sample	A sample of the custom field information.
Seq.	The position where the custom field data resides in OrgPublisher from the text input file used to create an org chart automatically. OrgPublisher automatically assigns sequence numbers to custom fields, beginning with field 20.

Dragging and Dropping Custom Fields

You can insert a custom field into your chart by dragging the custom field from the *Custom Field Properties* dialog into the Chart View. You can add a custom field to one position type or to all position types.

Inserting a Custom Field to a single Position type

1. Select **Data** from the Main menu then **Custom Field Properties** from the pull-down menu. You can also click the Custom fields button  in the toolbar. The *Custom Field Properties* dialog opens.
2. Verify that the **Drag and Drop for All Position Types** check box is not selected. If it is, click to clear it.
3. Select the custom field you want to drop into the chart. Click and hold down the mouse button.
4. Drag the mouse cursor into a box in the chart that contains the position type you want.
5. Release the mouse button. The custom field is inserted in every instance of that specific position type in the chart.
6. Repeat steps 3 - 5 for each custom field you want to add.

Inserting a Custom Field to all Position types

1. Select **Data** from the Main menu then **Custom Field Properties** from the pull-down menu. You can also click the Custom fields  button in the toolbar. The *Custom Field Properties* dialog opens.
2. Verify that the **Drag and Drop for All Position Types** check box is selected.
3. Select the custom field you want to drop into the chart. Click and hold down the mouse button.
4. Drag the mouse cursor into a box in the chart and release the mouse button. The custom field is inserted in every position type in the chart.
5. Repeat steps 3 - 4 for each custom field you want to add to all position types.

Hiding a Custom Field Label

You can choose to hide a custom field label in your org chart.

1. Right-click the custom field label in your chart.
2. Select **Hide label** from the drop-down menu. The label is no longer displayed in your chart.
3. To show a hidden label, right-click on the custom field data and click **Show label** from the drop-down menu.

   You can also select the **Hide label** option in the Custom Field Wizard when you create or modify a custom field.

Note: *Keep in mind when you choose to show or hide fields that all information you can view in the OrgPublisher chart or search results list is also displayed when you copy the chart to Microsoft PowerPoint or the search results to Microsoft Excel.*

Inserting a Custom Field for a Single Position Type

You can insert a custom field for a single position type by dragging it from the *Custom Field Properties* dialog.

Note: *The use of conditional formatting can affect position type summary totals.*

1. Select **Data** from the Main menu then **Custom Field Properties** from the pull-down menu. You can also click the Custom fields button  . The *Custom Field Properties* dialog opens.
2. You can also use the Custom fields button  in the toolbar and move the mouse pointer to the place within an existing box where you want to insert the custom field. Click the mouse to add it.
3. Make sure the field **Drag and Drop for All Position Types** is not selected. Click **Close**.
4. If the check box is selected, click on it to clear it then click **Apply**.
5. Position the cursor in the column to the left of the **Field label** of the custom field to be added. Click in the column and hold the mouse button down as you drag that custom field into the chart and place it within an existing box. Release the mouse button to add the custom field.

6. Double-click on the label for this custom field and type the new name, if applicable. Press **ENTER**.
7. The new field displays in the dialog and the chart.
8. If you are adding the field data manually, double-click on the right-hand side of this field and type your data, for example a phone number. Press **ENTER**.
9. If you want to format the new custom field, right-click on the field and select Format from the drop-down menu.

Inserting a Custom Field for all Position Types

You can insert a custom field for all position types by dragging it from the *Custom Field Properties* dialog.

Note: *The use of conditional formatting can affect position type summary totals.*

1. Select **Data** from the Main menu then **Custom Field Properties** from the pull-down menu. You can also click the Custom fields button  in the Format Toolbar. The *Custom Field Properties* dialog opens.

   In addition, you can use the Insert Custom Field button  in the toolbar and move the mouse pointer to the place within an existing box where you want to insert the custom field. Click the mouse to add it.
2. Make sure the field **Drag and Drop for All Position Types** is selected. Click **Close**.

Note: *You can also use this check box in conjunction with the Insert Hotspot button in the Insert toolbar.*

3. If the check box is not selected, select it and click on **Apply**.
4. Position the cursor in the column to the left of the **Field label** of the custom field to be added to a position type. Click in the column and hold the mouse button down as you drag that custom field into the chart and place it within an existing box. Release the mouse button to add the custom field.
5. Double-click on the label for this custom field and type the new name, if applicable. Press **ENTER**. The new field displays in the dialog and with every position type displayed in the chart.

6. Double-click on the right-hand side of each occurrence of this field and type your data, for example a phone number. Press **ENTER**.

7. If you want to format the new custom field, right-click on the field and select **Format** from the drop-down menu.

Reviewing Custom Field Security Summary

You can designate field security and then quickly review a summary of the security for each custom field in your EChart.

1. Select **Data** from the Main menu then **Custom Field Properties** from the pull-down menu. You can also use the Custom fields button  in the toolbar. The *Custom Field Properties* dialog opens.

2. Click View security summary. The *Field Security Summary* dialog opens, displaying the custom fields in your chart and the type of security assigned to each.

3. Click **Copy to Clipboard** if you want to copy the summary to another application for printing or to view later, or click **Close** to return to the *Custom Field Properties* dialog.

Create and Apply Hotspots

Note: *You can use hotspots to link to any file type that your web browser can recognize and display.*

Profile View hotspots do not work in the published PluginX or Planning charts when the hotspot data points to a data file from the local drive. Web pages, even those served from the local file system, are not allowed to access, open, or otherwise "touch" the local file system. This is a security measure as web pages shouldn't be allowed to do anything with your local files.

Inserting Hotspots

Hotspots provide a way to create links in an org chart that is published and viewed with a web browser, such as Internet Explorer. Any string that can be typed in an address line of a browser can be used as a hotspot, such as **mailto:**, **http://**, **file://**, etc. Hotspots are a type of custom field assigned to a specific position type, or all position types, and they appear in listings with other custom fields.

As with other custom fields, you can add hotspots for all position types or to a single position type. Each hotspot contains two components : a label for the field, and the name of the file to display when the hotspot is clicked. You can attach a hotspot to a specific custom field using the *Custom Field Properties* dialog.

You can set up a hotspot on a box title, job title, person's name or custom field to view another web page pertaining to the selected text. Hotspots can be clicked in the Chart View, Profile View, and the *Hover Profile* to open an email message (with the format mailto:), or to link to a page on your intranet or a Web page.

The Smart Links feature enables you to attach more than one hotspot to a field. When the end user clicks on a custom field, a list displays the names of all the hotspots attached to that particular field. This feature enables end users to access multiple applications or web pages from within a chart, and provides the administrator with more choices for drilling down to people, jobs, or department information.

You can insert a hotspot in your chart with:

Hotspot Wizard

Inserting Hotspots

Custom Field Wizard

Assigning Hotspots to Position Types

When you create hotspots, a type of custom field, using the Hotspot Wizard, you assign the hotspot to either a specific position type or to all position types. Assigning a hotspot to a single position type, such as open position, can allow links to the appropriate job descriptions. Assigning a hotspot to all position types in your chart allows you to make the physical locations, telephone extensions, or email addresses of all employees accessible to all employees.

1. Click the Insert Hotspot button  in the Insert Toolbar. Drag the cursor to the location in the chart where you want to add the hotspot and click the right mouse button. You can also select **Tools** from the Main menu then **Hotspot Wizard** from the options list. The *Hotspot Wizard* opens.
2. Follow the *Hotspot Wizard* prompts asking for the base path or target name, until you reach the dialog asking you to select the position types for which the hotspot will be active.
3. Click on the position type to expand it. You can also click **All Position Types.**
4. Click on the field you want as the hotspot link, **Box Title**, **Job Title**, or **Name**. A green arrow displays next to the selected field and the position type label. Click **Next**.
5. Follow the prompts to complete the wizard and open the *Custom Field Properties* dialog to attach the hotspot to a field and, if applicable assign security.

Note: *Profile View hotspots do not work in the published PluginX or Planning charts when the hotspot data points to a data file from the local drive. Web pages, even those served from the local file system, are not allowed to access, open, or otherwise "touch" the local file system. This is a security measure as web pages shouldn't be allowed to do anything with your local files.*

Attaching a Hotspot to a Field

You can attach a hotspot to a custom field by using the *Custom Field Properties* dialog. In addition you can attach multiple hotspots, known as Smart Links, to a field. When the end users click on the field, a list of the Smart Links appears and the user selects the appropriate hotspot. Smart Links also provide the administrator with more choices in how to display or access detailed information regarding people, jobs, and departments.

1. While in *Build Mode*, verify that you have correct URLs in your hotspot fields.
2. Select **Data** from the Main menu and **Custom Field Properties** from the pull-down menu or click the Custom fields button  in the toolbar. The *Custom Field Properties* dialog opens.
3. Select the hotspot you want to attach to a field. Only fields with a designated **Type of Hotspot** can be attached to another field.

   For instance, if one of your custom fields is an email address hotspot, instead of displaying the email address in the published chart, you can attach the hotspot to the **Name** field. When users click on a name in the published chart, the email client opens.
4. Click **Hotspot Attachment**. The *Attach Hotspot* dialog displays.
5. Click the down-arrow in the **Select field to attach hotspot** field.
6. From the pull-down list, select the field you want to be the "clickable" link in your published chart, for instance the **Box Title** or **Name**.
7. Click **OK**. The text box closes.
8. In the *Custom Field Properties* dialog, click **Apply**. Continue working in the dialog or click **OK** to close the dialog.
9. Test your hotspot by switching to *View Mode* and click on the field to which you attached the hotspot. If you attached multiple hotspots to a field, the list of Smart Links displays when you click on a field. Select the link you want to access.

Note: *Smart Links attached to a hidden field do not appear in the chart.*

Copying a Link to a Person in the Chart

With OrgPublisher you can copy the link to a person in the published chart ***if you publish to and access the published chart from a server***. You can copy the link from the person's **Name**, **Job title**, or **Box title**.

1. Open the published chart and right-click on a person's name, the job, or the box title. A list of menu options appears.
2. Select the **Copy hyperlink to person** or **Copy hyperlink to box** option.
3. Open an application that can recognize and use hyperlinks, such as an email client, and paste the link into the application. The hyperlink text appears.

For instance, you can copy a link to a person in a chart, paste the link into an email message, and send the email to a supervisor who should review information in this person's chart box. The supervisor clicks on the link and the chart opens at that person's location in the chart.

Note: *If there are multiple people listed in a box, OrgPublisher will open the box and select the first person listed.*

Using the Define dialog to set a Hotspot URL

When you use hotspots in your org chart, you must set a base URL or a target frame. The *Define* dialog contains two tabs, one for **Positions** and one for **Hotspots**.

1. Select **Edit** from the Main menu then **Define** from the pull-down menu. The *Define* dialog opens.
2. Click the **Hotspots** tab.
3. Type the **Base Hotspot URL or path name**. The base URL is the lowest level of the path to the directory where the linked document is saved. Setting the base URL helps you avoid passing in extra or repetitive data.
4. Or, you may want to type the **Web browser Target frame** name, if applicable. If you use HTML frames to display the results of all your hotspots, specify the target HTML frame name. If you are not using HTML frames, then accept the default **_parent**.
5. Click **OK**. The *Define* dialog closes and the file is saved.

Accessing Smart Links

With OrgPublisher end users can select from multiple hotspots attached to a single field. When the end user clicks on a custom field, a list displays the names of all the hotspots attached to that particular field. This feature enables end users to access multiple applications or web pages from within a chart.

Access Smart Links from the published chart

1. In the PluginX, or the published chart, place the cursor over a field, such as a name, job, or department. If there is a link, or hotspot attached to the field, the cursor changes.

2. Click on the field. A list of the hotspots, or Smart Links, attached to that field appears.

3. Click on the link you want. OrgPublisher opens the appropriate web page, document, or email client.

Note: *Profile View hotspots do not work in the published PluginX or Planning charts when the hotspot data points to a data file from the local drive. Web pages, even those served from the local file system, are not allowed to access, open, or otherwise "touch" the local file system. This is a security measure as web pages shouldn't be allowed to do anything with your local files.*

Define and Assign Position Types

Note: *Record Types for custom position types should use brackets, for example <T>.*

The use of conditional formatting can affect position type summary totals.

Only Staff Function position types can reside in a Staff Function box.

You can also assign position type using the Update Person dialog or define the priority of a position type.

Creating and Defining Position Types

OrgPublisher uses position types to structure your company's information and organizational chart. A position type is a classification or assignment within your organization to which a person is associated. You can format boxes and summarize data, such as head counts, by position type.

You must define certain values when you create a position type in OrgPublisher:

- **Priority** - Determines where your custom position types will be placed within a box in relationship to other position types. The lower the priority number, the higher it is placed in the box. OrgPublisher automatically assigns this number, but you can change it through the *Define* dialog.
- **Count** - Includes a position type in the head count total or a head count by position type that can be totaled.
- **Box type** - Determines the type of box that is inserted for this position type. Each box type has a different position within the chart. For example, the first assistant box is placed below and to the right of the box to which it reports. If there is more than one assistant, the boxes alternate from right to left below the box to which it reports.

Values include: **Normal Box**, **Assistant Box**, **Partner Box**, and **Staff Function Box**.

OrgPublisher's default, or standard position types are:

- **Manager** - A manager position type represents a person who is the manager or supervisor of the people within a chart box.
  - **Count** - Yes
  - **Priority** - 0

– **Box Type** - Normal

- **Employee** - An employee position type represents a person who reports to a manager or supervisor within a chart box.
  – **Count** - Yes
  – **Priority** - 1
  – **Box Type** - Normal
- **Assistant** - An assistant position type represents a person who is displayed in an assistant box in the org chart.
  – **Count** - Yes
  – **Priority** - 0
  – **Box Type** - Assistant
- **Contractor** - A contractor position type represents a person who is contracted from an outside source and who is not counted in head count roll-ups.
  – **Count** - No
  – **Priority** - 2
  – **Box Type** - Normal
- **Indirect report** - An Indirect report position type represents a person who reports indirectly to a manager or supervisor. "Indirect" is a modifier or condition of the assigned position type, so you should use a record type of "IM" for an indirect reporting relationship of a manager or an "IE" for an indirect relationship of an employee.

  An input record uses an “I” in the **Record Type** field in front of the assigned position record type. For example, an IE is an employee who reports indirectly to another position. ***If you use only "I" as your record type, OrgPublisher defaults the record to IM***.
  – **Count** - No
  – **Priority** - N/A
  – **Box Type** - Normal

  Indicating that one person reports to more than one manager is accomplished with multiple records and use of position types.

  One box must be designated position type "E" for Employee. Other boxes must be designated position type "I" for Indirect Report. (Indirect Reports are not included for head count purposes. Indirect Report boxes are displayed with dotted lines around the box, as well as the lines to the box.) When building from data, you need multiple employee records — one for each manager (see sample of data below).

  If you are building from data the records should look like the following:

ParentBoxID	BoxID	Box Title	Record Type	ID	Last Name	First Name

Manager 1	1234	xxx	E		Smith	Carol
Manager 2	1234a	xxx	I		Smith	Carol
Manager 3	1234b	xxx	I		Smith	Carol

- **Open position** - An open position type represents any position/ employee that is not currently filled. You can create open positions when building a chart by double-clicking on the employee name and selecting **Open position**. You can create open positions when building from data by passing null records into Input File positions 6, 7, and 8.
  - **Count** - Yes
  - **Priority** - N/A
  - **Box Type** - N/A
- **Partner** - A partner position type represents a person who is at the same level as the box you link it to, normally the top of chart .
  - **Count** - No
  - **Priority** - N/A
  - **Box Type** - Partner
- **Staff function** - A staff function position type represents a person or cost center displayed in a Staff Function box in the org chart. The default values are listed, although you can customize the settings to match your org chart requirements.
  - **Count** - Yes
  - **Priority** - 0
  - **Box Type** - Staff Function
- **Succession candidate** - A Succession Candidate record type represents a person who is a candidate for a specific position currently being held by someone else. Succession candidate record types are typically placed in a normal box type with other candidates, as well as the current person holding the position they may inherit.
  - **Count** - Yes
  - **Priority** - 1
  - **Box Type** - Normal

Note: *Only Staff Function position types can reside in a Staff Function box.*

Another way to identify positions within your organization is through the multi-level peer display option. You can indicate that several positions report to one manager, but that some of those positions are at different levels within your organization.

You can also define a conditional position type to which you assign a group for formatting purposes. Conditional formatting is meant to increase the visibility of distinct groups in your chart based on a single attribute, such as "High Performers."

Note: *It is recommended that you do not select a group that references secure fields if you plan to publish a secure thin client EChart because you will receive undesirable results.*

The rich client EChart summary counts using conditional formatting show numbers calculated as if all fields are visible to the end user. This is because EChart summaries are calculated at publishing time and cannot be recalculated.

Adding a Custom Position Type

OrgPublisher provides standard position types in order to create your organizational hierarchy. These position types are **Manager**, **Employee**, **Assistant**, **Contractor**, **Indirect Report**, **Open position**, **Partner**, **Staff function**, and **Succession Candidate**.

You can also create your own position types either to better match a position within your company, such as Director or Vice President, or to assign conditional formatting to a single-attribute group for display purposes.

1. Select **Tools** from the menu bar then **Position type Wizard** from the drop-down list. The Position Type Wizard opens. Click **Next**.
2. Select the **New Position Type** radio button. Click **Next**.
3. Type the **Position Type** name.
4. If you are creating a position type in order to assign conditional formatting to a group, click the down-arrow and select a **Group** name. Click **Next**.

Note: *It is recommended that you do not select a group that references secure fields if you plan to publish a secure thin client EChart because you will receive undesirable results.*

The rich client EChart summary counts using conditional formatting show numbers calculated as if all fields are visible to the end user. This is because EChart summaries are calculated at publishing time and cannot be recalculated.

If there is more than one group-based position type for which a person qualifies, the first match is used in Search and Summary tasks.

5. Indicate whether the new position type is to be displayed in a **Normal Box**, **Assistant Box**, **Partner Box**, or **Staff Function Box**. Click **Next**.

Note: *This box type dialog does not display if you have assigned the new position type to a group. Conditional formatting does not change the original position type, from which the box type is decided.*

You must create a custom position type before you can add a Staff Function Box to your blank chart. Only Staff Function position types can reside in a Staff Function box.

6. Indicate if the position type is to be included in the total **Head count** by selecting the **Yes** or **No** radio button. Click **Next**.
7. Type or select a **Record Type** code for this position. Click **Next**.
8. Click **Box Style and Color** to open the *Format* dialog to the **Box** tab. Choose the style of the chart box and the box color. Click **OK**.
9. Click **Text Style and Color** to open the *Format* dialog to the **Text** tab. Choose the text color, alignment, etc. Click **OK** then **Next**.
10. Click **Finish**. The new position type is saved within your chart file, even if you do not actually save the chart after creating the position type.

Assigning a Position ID Type

You can compare two charts that have identical custom field definitions, and generate a change report. If you do not automatically import a position ID (see **Field 17** in the Input File Layout topic), in order to achieve consistent results, it is recommended that you assign a custom field type of **Position ID** to a unique record number across all charts.

Note: *If the charts you are comparing do not contain a Position ID type in field 17 or a custom field position type, OrgPublisher uses the ID in field 5 from the Input File Layout. If neither exist, an error message displays and the comparison does not occur.*

In addition new or renamed custom fields will not match when comparing charts and will not be included in the change report.

1. Select **Data** from the Main menu then **Custom Field Properties** from the pull-down menu. You can also click the Custom Field Properties button  in the toolbar. The *Custom Field Properties* dialog opens.

2. Select the custom field you want to use for **Position ID** and **Tab** to the **Type** column.
3. Click the down-arrow to view a list of custom field types.
4. Scroll to the end of the list and select **Position ID**.
5. Click **Apply** or **Close**.

Changing a Person's Position Type

Note: *If you want to use conditional formatting for a single attribute in a group, see the About Conditional Formatting section in this document. If you build your chart with data, the conditional position type does not override the position type pulled from your data source.*

1. Double-click on the person's name in the Chart View. The *Update Person* dialog opens.
2. Double-click the new **Position type** you want to use. The *Update Person* dialog closes and the new position type is accepted. You can also select the new position type from the list, then click **OK**.

   The person in the box inherits the formatting of the new position type. In addition, the ID field contains the unique ID information necessary to enable the use of multi-relationship icons and EChart security.

Changing from an Open Position

You can change an open position to the appropriate position type at any time.

1. Verify you are in *Build Mode* then double-click the open position in the *Chart View*. The *Update Person* dialog opens.
2. Type the name of the person who filled this position in the **First name**, **Second**, or **Last name** fields.
3. You can also update the **ID** field in this dialog, if required.
4. Select the **Position type** from the list if the chart box does not designate one already.
5. Click **OK**. The open position text in the chart box is replaced by the person's name. If the chart box is an assistant or partner box, the position type will change automatically when you enter a person's name.

Changing the Open Position Label

You can modify the label for open positions in the Chart View at any time.

1. Select **Edit** from the Main menu then **Define** from the pull-down menu. The *Define* dialog opens to the **Positions** tab.
2. Select the record line for **Open position** and, in the **Position type** field, type the label name you want to use.
3. Click **OK**. All open positions in your chart will display the new text.

Creating a Staff Function Position Type

Use the Position Type Wizard to create a position type to add a Staff Function to an existing chart. Once this position type is established, you can insert a Staff Function box type to your chart. If you open an empty chart, the Staff Function is already available in the wizard.

Note: *Only Staff Function position types can reside in a Staff Function box.*

1. Open the *Position Type Wizard* by clicking the  button in the Wizard View and then click **Next**. You can also select **Tools** from the Main menu then **Position type Wizard** from the pull-down list. The *Position Type Wizard* opens.
2. Click **Next** and select the **New Position Type** radio button. Click **Next**.
3. Type the **Position Type name** for which you are creating the Staff Function box or type "Staff Function." Click **Next**.
4. Select the **Staff Function Box** radio button. The actual box type does not contain special formatting by default, but you can format the box to your specifications, as noted in Steps 7-8. Click **Next**.
5. Indicate whether or not this new position type is included in the total head count. Click **Next**.
6. Type the **Record Type** code for this position, **<SF>**. The code must be include brackets. Click **Next**.
7. Click **Box Style and Color** to open the *Format* dialog to the **Boxes** tab. Choose the style of the chart box and the box color you want for the Staff Function position type. Click **Apply** to add your changes

and continue working in the Format dialog. Click **OK** to add your changes and close the dialog.

8. Click **Text Style and Color** to open the *Format* dialog to the **Text** tab. Choose the text color, alignment, etc. Click **Apply** to add your changes and continue working in the *Format* dialog. Click **OK** to add your changes and close the dialog. Click **Next**.
9. Click **Finish**.
10. In the *Chart View*, add a box with a person and job where you want to place the Staff function.
11. Double-click on the name field to open the Update Person dialog and select the Staff Function position type.
12. The staff function box title displays and the box may be repositioned. Double-click on **Staff Function** to change the box title. If you add reports to this box, a drill-down button displays and you must drill to view those reporting boxes.

Including/Excluding Position Types in Summary View

When you exclude, or do not count, a position type in the Summary View the summary amounts for these types are not displayed in the view, and are subtracted from any totals, except for group totals.

When you include a counted position type, the amounts display in the *Summary View* and are added to any totals. You can exclude managers from the total in summary fields assigned to their boxes.

Exclude Managers from their own Totals

1. Select **Options** from the Main menu then **Summary options** from the pull-down menu.
2. Select **Exclude managers from their own totals**. The totals in the manager boxes no longer include the manager.
3. You can also exclude managers from their own totals when using the Summary Wizard.

Exclude/include Position Types in Totals

1. Select **Edit** from the Main menu then **Define** from the pull-down menu. The *Define* dialog opens.
2. Click on the record line of the position type you want to exclude from your Summary View totals. By default, indirect reports and contractors are already excluded from *Summary View* totals.
3. Click in the **Count** field. A drop-down arrow appears.
4. Click **No**. If you want to include a position type, for example indirect reports, click **Yes**.
5. Click **OK** to accept the change and close the *Define* dialog.

Note: *The use of conditional formatting can affect position type summary totals.*

If there is more than one group-based position type for which a person qualifies, the first match is used in search and summary tasks.

Listing All or Current Positions

The *List View* displays all of the positions in your chart, or only those positions which are currently shown in the *Chart View*. The current OrgPublisher default is to display only the positions currently displayed in the *Chart View*.

Note: *Older versions of OrgPublisher use the default option of displaying all positions.*

If you want to list only those positions displayed in the Chart View (such as a set number of levels), leave the default as is. If you want to list all positions in your chart file, you can:

1. Select **Options** from the Main menu then **List View** options from the pull-down menu.
2. Clear **Positions in chart**. The **Search View** pane in the List View is now active.

Or

Open the *List View* and select the **Search View** pane. All positions are now listed.

Making Several Insertions for the Same Position Type

You can apply the format for the same position type to several boxes or jobs if you select a position type before you begin inserting boxes.

1. Select **Insert** from the Main menu then **Select position type** from the pull-down menu. The *Select Position Type for Insert* dialog opens.
2. Click on the position type you want to insert and clear the **Automatically assign Position Type** check box.
3. If you are inserting multiple boxes with this position type, or you want to make it the default position type when you insert a box, click the **Insert using this Position Type** check box.
4. To automatically assign a manager position type to the first inserted box and an employee position type on the box dropped on that position, click the **Automatically assign Position Type** check box.
5. If you do not select either check box, OrgPublisher prompts you for the position type when you insert a job or person into an empty box.
6. Click **OK**. The dialog closes.
7. Select the appropriate button from the toolbar and insert the box where you want it.

Modifying a Position Type

You can modify an existing position type using the Position Type Wizard.

Note: *The use of conditional formatting can affect position type summary totals.*

1. Click the Position Type Wizard button  in the Wizard View or select **Tools** from the Main menu then **Position type Wizard** from the options list. The Position Type Wizard opens. Click **Next**.
2. Select the **Existing Position Type** radio button.
3. In the position type list, click on the position type you want to modify. Click **Next**.
4. Accept the **Position type name** shown, or rename the position type.

5. Accept the **Group** shown for conditional formatting or select a different group. Click **Next**.

Note: *It is recommended that you do not select a group that references secure fields if you plan to publish a secure thin client EChart because you will receive undesirable results.*

The rich client EChart summary counts using conditional formatting show numbers calculated as if all fields are visible to the end user. This is because EChart summaries are calculated at publishing time and cannot be recalculated.

6. Accept the box type shown or select a different radio button, **Normal Box**, **Assistant Box**, **Partner Box**, or **Staff Function Box**. Click **Next**.

Note: *You must create a custom position type before you can add a Staff Function Box to your blank chart.*

7. Accept the **Yes** or **No** indication for the total **Head count** or select a different radio button. Click **Next**.
8. Accept the displayed **Record Type** code for or type or select a new record type. Click **Next**.
9. If applicable, click **Box Style and Color** to open the *Format* dialog to the **Box** tab. Choose the style of the chart box and the box color. Click **OK**.
10. If applicable, click **Text Style and Color** to open the *Format* dialog to the **Text** tab. Choose the text color, alignment, etc. Click **OK** then **Next**.
11. Click **Finish**.

Moving Open Positions

You can move positions from one location to another in your chart.

1. Press and hold down the left mouse button over the open position.
2. Drag the cursor to the new box title, job title, or name, and release the mouse button. The open position and any custom fields associated with the position are inserted below the selected location.

   When you drop an open position onto a box title, a job title is automatically created for the open position.

When the last open position is moved from a job title, a copy of the open position remains at the original location. The last open position must be deleted manually, because deleting the last open position also deletes the job title.

Renaming a Position Type

1. Select **Edit** from the Main menu then **Define** from the pull-down menu. The *Define* dialog opens at the **Positions** tab.
2. Select the record line for the position you want and, in the **Position type** field, type the label name you want to use.
3. Click **OK**. All instances of that position in your chart display the new text.

Selecting a Position Type for Insert

The first time you open OrgPublisher, an employee position type is automatically assigned to the first inserted box. After that, the default is the last position type assigned.

1. Select **Insert** from the Main menu then **Select position type** from the pull-down menu. The *Select Position Type for Insert* dialog opens.
2. Choose a position type by clicking on it. A green check mark indicates the current selected position type.
3. If you want to choose a position type to insert for each person you add to your chart, select the **Insert using this Position Type** check box. OrgPublisher assigns each subsequent person that position type.
4. If you want OrgPublisher to use the default position type, the last one inserted, select the **Automatically assign Position Type** check box. This is the default when you first open OrgPublisher and the Employee position type is selected.
5. Click **OK** to accept the changes and close the text box.

Showing or Hiding All Options Associated with a Position Type

Note: *Keep in mind when you choose to show or hide fields that all information you can view in the OrgPublisher chart or search results list is also displayed when*

you copy the chart to Microsoft PowerPoint or the search results to Microsoft Excel.

1. Select **View** from the Main menu then **Show / Hide chart components** from the pull-down menu. The *Show/Hide Chart Components* dialog opens. You can also click the Show/Hide Chart Components  button in the toolbar.
2. Select a **Style** to modify from the drop-down list.
3. Select a **Group displayed** to modify in the chart, if applicable.
4. Select the **Components** tab. Each position type in your chart is listed. Click on the plus sign to display each component within the position type. A green check mark to the left indicates a shown component, and a red X indicates a hidden component.
5. Select a position type, or **All Position Types**, to change the status. All components for the position type are affected unless you place an X next to the individual component.
6. Click **Apply** to update the chart and keep the dialog open for further changes, or click **OK** to update the chart and close the dialog.

Open and Use Views

Note: *Although this section provides information on manually editing a chart, remember that if you want the changes to remain permanent, you must apply the changes to your HR database. When your HR data is refreshed and you open your chart, your manual changes are overwritten.*

9 Box Matrix View

Available in OrgPublisher Premier, the *9 Box Matrix* enables you to evaluate your organization's talent pool using comparative sets of data. This feature has also been referred to as "personal score cards," "tombstones," or "baseball cards." 9 Box matrices are available in the OrgPublisher application as well as charts published as PluginX, EChart rich client, and planning charts. The *9 Box Matrix* requires 2 numeric (integer) fields of data. Typically, these are a field indicating performance level and a field indicating potential.

The *9 Box Matrix View* displays the results from the 9 Box Matrix Wizard. A combination of Y and X axis determines the box within the grid where the employee is placed. The top right-most box displays **High Performance / High Potential** employees, while the bottom left-most box contains **Low Performance / Low Potential**. The title of each axis is the same as the field you selected for that criteria.

As the chart administrator, you define the fields used for the 9 Box Matrix within a published chart. Chart planners can determine the fields used in a planning chart.

Click the 9 Box Matrix button  in the toolbar to view the matrix.

With the *9 Box Matrix View* you can:

Creating a 9 Box Matrix (when opening for the first time)

Filtering Groups in the 9 Box Matrix

Modifying 9 Box Matrix Results

Selecting 9 Box Filters

Sorting the 9 Box Matrix

Chart View

The *Chart View* is stationary and is the default display in the OrgPublisher window. It shows the chart boxes as you are editing or building in your organizational chart. You can format the chart background and title, as well as the individual components, to give your chart more impact. You can use the multi-level peer display and print the *Chart View* as a book or wall chart.

In the *Chart View*, you can drill-up or down through different chart levels and hide or show different chart components. If you are working with a published EChart, the allowable levels are already set through the *Publishing Wizard* and cannot be overridden.

With the *Chart View*, using menus, toolbars, and right-click menus you can also:

Spotlighting Groups in the Chart View or Spotlighting Search Results in the Chart View

Adding a Person to a Group

Add and Format a Chart Legend

Groups View

The *Groups View* is style specific, displaying a list of groups created for the current chart style.

The *Groups View* is anchored to the right side of the OrgPublisher window and closes as soon as you have selected a group to view. End users can save ad hoc groups to the **My groups** tab in the Search View in a published PluginX chart. These groups display in the PluginX only.

With the *Groups View* you can:

Opening a Selected Group in the Chart View

List View

The *List View* displays a listing of your organization's employees shown in the Chart View, along with any available custom fields you wish to display. The *List View* is style specific. Fields that may be hidden in your organizational chart are included in a *List View* unless you choose to hide them using the *List View* right-click menu.

The *List View* contains two panes, **List View** and **Search View**. Columns shown in the *List View* determine the columns shown in the Search View.

Click the *List View* button  in the Views Toolbar to display a list of your employees and their custom fields, such as telephone extensions, or select **View** from the menu bar, then **List View** from the pull-down menu. The list pane opens.

If you are working with a published EChart , an additional pane displays with the records list. The *List View* contains a **List of currently displayed** pane and another, **List View of all in chart** pane, with all the EChart records.

Note: *The List View is available as an index in the PDF format. In addition the Name field is the automatic default. If you want to display the first, middle and last names you must right-click and select the Show/hide columns options to make your choices.*

If EChart security is enabled, the published chart reflects only the information accessible to the user, based on the level of security.

The *List View* defaults to the bottom of the window, but you can drag it to another location. When you print a chart as a book, the *List View* automatically prints as an index and contains page numbers so that you can locate different chart information in the book.

With the *List View*, using menus, toolbars, and right-click menus you can:

Adjusting Column Widths in List View

Copying the List View

Listing All or Current Positions

Locating Information with the List View

Printing the List View

Sorting the List View

Profile View

The *Profile View* focuses on a selected employee, box title, or job title in your chart and can contain additional information that may not fit in the chart boxes. This information can also be organized under subheadings .

Using the *Profile View* to display information such as telephone numbers, job titles, office locations, salaries, job descriptions, departments, mission statements, and photos can eliminate the need for hotspots to HTML documents that display this information.

If you still want to access a hotspot, it's available in this view. Simply insert the hotspot in the Chart View and publish your chart with the open *Profile View* and end users can click on the hotspot to link to another document or page on your intranet.

Note: *Profile View hotspots do not work in the published PluginX or Planning charts when the hotspot data points to a data file from the local drive. Web pages, even those served from the local file system, are not allowed to access, open, or otherwise "touch" the local file system. This is a security measure as web pages shouldn't be allowed to do anything with your local files.*

In OrgPublisher Premier, *Side-by-Side Profiles* are also available.

Click the Profile View button  in the Views Toolbar to display this view or select **View** from the menu bar, then **Profile View** from the pull-down menu. The *Profile View* defaults to the right side of the window, but you can drag it to another location. The default is to show the top box in the chart when you open the view. You can also print the *Profile View*.

Note: *The Profile View is not available in PDF format.*

The Profile View is not the same as the Hover Profile. Modifications made in one place are not reflected in the other.

If EChart security is enabled, the published chart reflects only the information accessible to the user, based on the level of security.

With the *Profile View*, using menus, toolbars, and right-click menus you can:

Adding Subheadings to the Profile View

Setting Default Profile View Fields

Reordering Field Sequence in Profile View

Displaying Profile Fields

Printing the Profile View

Search View

The *Search View* offers several elements of the *Search* dialog, including selecting variables for the search. With this view, you can conduct searches and create groups, as well as send e-mail to groups. In addition, the *Search View* enables end users to search chart information and create their own groups in the **My groups** tab, available only in the PluginX chart.

This feature enables org chart administrators to publish a chart with the *Search View* displayed in the browser and enables end users to conduct queries in the published chart. The *Search View* is style specific, and opens within the List View and displays the same columns shown in the *List View*.

You can use a group filter  in your searches if you want OrgPublisher searches only the selected group and displays the matching records. If no group filter was selected, the entire chart is searched and matching records shown. You can also place the search result ins Microsoft Excel; see the Viewing Search Results in Microsoft Excel procedure for details.

Note: *Published real-time charts provide single field searching capabilities; complex or group searching and saving **My groups** are not available.*

The *Search View* displays everyone in the chart or a selected section of the chart or group, and contains two tabs, **Search** and **Groups**.

The *Search View* enables you to perform additional tasks, such as copy the list, save a new group, or send e-mail to the entire group. The **Groups** tab contains buttons to delete a group or open the *Group Editor* dialog in order to edit a group definition or add a new group definition.

The custom field type **Email** must be used within your chart in order to enable the "email to group" feature in the *Search View*. If the custom field type **Email** is not used, the email to group button does not appear in the dialog. Additional buttons in the *Search View* include the "start search" or Go button 

. The Reset button 

clears the previous search results and resets the view to display everybody. The Copy the list to clipboard  , which copies your search results to the clipboard, enables you to paste them in another application.

The Save as button  opens the *Enter a group name* dialog in order save the search results as a new group. The Open search results in Microsoft

Excel button  automatically opens Excel and places the search results within the worksheet. The Spotlight search results in chart button  dims boxes that are not part of the selected group or search results. You can also choose to include the Include the search results  in the *Profile View*.

The **Search** tab contains the variable fields found in the *Search* dialog. You can choose the field to search, specify what you want to find in that field, and save the results as a group. You also have the option to search the chart under a specified person. For instance to search on a manager's reporting group, you must first select the manager box in the *Chart View* and then select the **Search under** check box in the *Search View*.

Note: *This feature begins the search at this level in the chart but does not confine the search to that single hierarchical tree.*

The **Groups** tab of the *Search View* displays the existing groups in the org chart. It enables you to create a new group description, delete a group, or edit an existing group description. When you select a group name, the list pane displays that group's members. The Email to group feature is also available in this tab if the chart contains custom fields assigned to the **Email** type.

The **Groups** tab contains several buttons. The New Group Definition button  opens the *Group Editor* dialog to add a new group definition.

The Delete Group Definition button  deletes a selected group, and the Edit Group Definition button  opens the *Group Editor* dialog to edit an existing group definition.

The Export groups button  opens the *Select Groups to Export* dialog.

The Import groups button  opens the *Select Groups to Import* dialog.

The custom field type **Email** must be used within your chart in order to enable the email to group feature in the *Search View*. If the custom field type **Email** is not used, the email to group button does not appear in the dialog.

The Copy the list to clipboard button  , which copies your search results to the clipboard, enables you to paste them in another application.

The Open search results in Microsoft Excel  automatically opens Excel and places the search results within the worksheet.

The Spotlight search results in chart button  dims boxes that are not part of the selected group or search results.

You can also navigate through the chart by clicking on a group record. OrgPublisher moves to that box in the group chart. The group list can be sorted by clicking on a column.

The *Search View* also provides a **My groups** tab when the chart is published. This tab is viewable only in the published chart. Once your org chart is published with the *Search View*, end users can search for and save their own groups, which are displayed in the **My groups** tab in the published chart.

Note: *If end users open the Search View in a large published chart, for instance larger than 2,000 records, that was not published as an EChart , no records will display in the pane until a search is performed.*

If EChart security is enabled, the published chart reflects only the information accessible to the user, based on the level of security.

With the *Search View*, using menus, toolbars, and right-click menus you can:

Searching by Name

Searching by Job Title

Searching by Box Title

Searching All Fields

Conducting a Boolean Search

Copying a Group List

Adding a Group by Searching

Deleting a Group

Editing a Group Definition

Exporting and Importing Groups

Spotlighting Groups in the Chart View

Sending Email to a Group

Style View

The *Style View* displays a list of the different styles you have created for the open chart. Chart styles display in alphabetical order. The published chart opens in the style you selected in the Publishing Wizard.

Click the Style View button  in the toolbar to display this view or select **View** from the menu bar, then **Style View** from the pull-down menu. The *Style View* defaults to the left side of the window, but you can drag it to another location.

Your chart may use tab view buttons instead of the *Style View*.

Note: *You can also format your chart by using the Chart Design Templates.*

With the Style View you can:

Viewing Available Styles

Displaying Chart Styles

Pinning the Style View for active use

Summary View

The *Summary View* is a report of summary fields from your organizational chart, which is easily viewed and printed, either in a summary report or a graph. The summary amounts shown in the view pertain to the top box displayed, regardless of how many levels are in view. Any numeric custom fields can be summarized and displayed in this view. OrgPublisher provides head count totals by position type and group automatically.

Summary View data may not initially display in a published chart when the following set of conditions exist:

- The current style is different from the publishing definition's starting style.
- The current style has a different top of chart than the actual top of chart.
- Summaries or group icons are showing.

You can prevent these issues by publishing the chart using the current style as the publishing definition's style.

You can also open the *Group Editor* dialog from the *Summary View* by clicking on the group name.

Click on the Summary View button  in the toolbar to display this view, or select **View** from the menu bar, then **Summary View** from the pull-down menu. *Summary View* opens at the **Summaries** tab. You can also select the **Graphs** tab. The summary numbers in the view may change, based on the box selected in the chart. In addition, the **Everyone** count includes all records, whether or not they are displayed in the chart.

The *Summary View* defaults to the bottom of the window, but you can drag it to another location. You can also print or copy the *Summary View*.

Note: *Orphan records and broken hierarchies can adversely affect summary and security functions. Unexpected results can occur that may cause head count or other totals to be incorrect.*

The Summary View is not available in the PDF format or in published real-time charts.

Successor candidate position types are not included in head counts or summaries.

Summary fields are added with the *Summary Wizard* or from the *Custom Field Properties* dialog.

With the *Summary View*, using menus, toolbars, and right-click menus you can:

Displaying Summary Fields

Exclude/include Position Types in Totals

Printing the Summary View

Resizing Rows and Columns in Summary View

Copying the Summary View

Tree View

The *Tree View* displays chart components in outline format and can be used to navigate through large charts. Simply click a chart component in the tree and the box containing that component is placed in the center of the *Chart View*.

Click the Tree View button  in the toolbar to display this view or select **View** from the toolbar, then **Tree View** from the pull-down menu.

The *Tree View* defaults to the right of the window, but you can drag it to another location. To set the *Tree View* display options, click **Options**, **Tree View options**, then **Outline** or **Full**. The *Outline* mode displays only the job or box titles, and you cannot expand any records. The *Full* mode displays all the fields shown in the chart.

Note: *The Tree View is not available when publishing as an EChart thin client or PDF.*

With the Tree View you can:

Printing a View

Expanding or Collapsing Levels in Tree View

Hiding or Showing Icons in Tree View

Locating Information in the Chart with Tree View

Using the Symbol Indicators in Tree View

Wizard View

The *Wizard View* displays buttons that open a wizard to perform OrgPublisher tasks, although some wizards do not display in this view. Details on opening a wizard can be found in the Opening a Wizard procedure.

Click the Wizard View button  from the toolbar to open this view, or select **View** from the Main menu, then **Wizard View** from the options list.

The *Wizard View* defaults to the left side of the window, but you can drag it to another location.

With *Wizard View*, using menus, toolbars, and right-click menus you can:

Opening a Wizard

Resizing Wizard Icons

Using the Hover Profile

The *Hover Profile* is a quick way to view the most important employee information without opening the *Profile View*. The pop-up profile is anchored to the upper right or, depending on the location in the *Chart View*, the upper left, of the data element (box title, job title, or name) that the mouse is over.

The *Hover Profile* is style-specific and is available in *View Mode* or published chart only. The *Hover Profile* defaults to off. End users can access it if you publish a chart with the *Hover Profile* enabled.

The *Hover Profile* is not the same as the Profile View. Modifications made in one place are not reflected in the other.

You can:

Enable the Hover Profile

Viewing the Hover Profile

Adding Subheadings to the Hover Profile

You can add subheadings to the *Hover Profile* using the *Configure Profile View* dialog. Subheadings can help you organize data fields for better viewing. Subheadings are affected by security attached to fields beneath the headings.

Note: *When all fields under a heading are secured so that a particular end user can not view them, the subheading above the fields is also hidden for that end user.*

The Profile View is not the same as the Hover Profile. Modifications made in one place are not reflected in the other.

1. Right-click on a field name in the *Hover Profile*, and select the **Configure Profile View** option. The *Configure Profile View* dialog opens.

   The dialog contains **Person**, **Job**, and **Box** tabs, as well as **Add heading**, **Edit heading**, and **Delete heading** buttons. You can also resize the *Hover Profile* in the **Popup View Size** section.

2. Choose the box component for which you want to assign a subheading. If your fields are in the order you want to display them, you can highlight the first field you want to display below the subheading then click **Add heading**. The *Heading Caption* dialog opens.

3. Type the name of the heading you want to use and click **OK**. The subheading appears at the point you highlight in the list or, if you don't highlight a field, it appears at the bottom of the list in the *Configure Profile View* dialog. The corresponding check box is automatically selected for display in the *Hover Profile*.

4. Use the **Move Up** or **Move Down** buttons to arrange the subheading and the fields to display under it.

5. Click **OK** to accept changes and close the dialog.

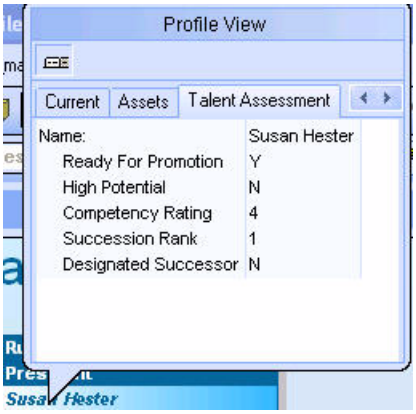


Figure 105

Editing Subheadings in the Hover Profile

1. Right-click on a field name in the *Hover Profile*, and select the **Configure Profile View** option. The *Configure Hover Profile* dialog opens

2. Select the subheading you want to modify.

3. Click **Edit heading**. The *Heading Caption* dialog opens.

4. Modify the subheading name as necessary and click **OK**. The change is saved and the dialog closes. The *Hover Profile* reflects the name change.

Deleting Subheadings in the Hover Profile

Note: *There is no warning prior to deleting the subheading.*

1. Right-click on a field name in the *Hover Profile*, and select the **Configure Profile View** option. The *Configure Hover Profile* dialog opens.

2. Select the subheading you want to delete.

3. Click **Delete heading**. The subheading is immediately deleted. It no longer displays in the dialog or the *Hover Profile*. All check boxes for the associated components are cleared, and the components do not display in the *Hover Profile*.

Adding Subheadings to the Profile View

You can add subheadings to the *Profile View* using the *Configure Profile View* dialog. Subheadings can help you organize data fields for better viewing. Subheadings are affected by security settings attached to fields beneath the headings.

Note: *When all fields under a heading are secured so that a particular end user can not view them, the subheading above the fields is also hidden for that end user.*

The Profile View is not the same as the Hover Profile. Modifications made in one place are not reflected in the other.

1. Right-click on a field name in the *Profile View*, and select the **Configure Profile View** option. The *Configure Profile View* dialog opens.

   The dialog contains **Person**, **Job**, and **Box** tabs, as well as **Add heading**, **Edit heading**, and **Delete heading** buttons.

2. You can modify each tab to work as a *Person Profile View*, *Job Profile View*, and *Box Profile View*. Select the tab in which you want to add subheadings.

3. Choose the component for which you want to assign a subheading. If your fields are in the order you want to display them, you can

highlight the first field you want to display below the subheading then click **Add heading**. The *Heading Caption* dialog opens.

4. Type the name of the heading you want to use and click **OK**. The subheading appears at the point you highlighted in the list or, if you didn't highlight a field, at the bottom of the list in the *Configure Profile View* dialog. The corresponding check box is automatically selected for display in the *Profile View*.

5. Use the **Move Up** or **Move Down** buttons to arrange the subheading and the fields to display under it.

6. Click **OK** to accept changes and close the dialog.

   The *Profile View* displays the new subheading, indented one space, with corresponding fields indented two spaces, and listed beneath the subheading.

Editing Subheadings in the Profile View

1. Right-click on a field name in the *Profile View*, and select the **Configure Profile View** option. The *Configure Profile View* dialog opens.

2. Select the profile tab you want to modify, **Person**, **Job**, or **Box**, and select the subheading you want to modify.

3. Click **Edit heading**. The *Heading Caption* dialog opens.

4. Modify the subheading name as necessary and click **OK**. The change is saved and the dialog closes. The *Profile View* reflects the name change.

Deleting Subheadings in the Profile View

Note: *There is no warning prior to deleting the subheading.*

1. Right-click on a field name in the *Profile View*, and select the **Configure Profile View** option. The *Configure Profile View* dialog opens.

2. Select the profile tab you want to modify, **Person**, **Job**, or **Box**, and select the subheading you want to delete.

3. Click **Delete heading**. The subheading is immediately deleted from the *Configure Profile View* dialog and the *Profile View*. The associated field check boxes are cleared, and no longer display in the *Profile View*.

Adjusting Column Widths in List View

1. To resize a column width in the *List View*, place the cursor in the column heading on the line separating one column from the next. Click and hold down the left mouse button. The cursor changes appearance.
2. Drag the column line to the width you want and release the mouse button. The column is resized.

Copying the List View

You can copy information from the *List View* and paste it into other Microsoft® Windows® applications.

Note: *If you are working with a published EChart, because of its size, the Copy whole list option is not available. You can, however, use the Search feature and select the Everyone group, then copy the list to the clipboard.*

1. To copy a record, highlight the record in the *List View* and right-click.
2. Select **Copy selection** from the options list.
3. Click the Copy button  in the toolbar.
4. Open the Windows application and click the Paste button  . The selection appears in the new application.
5. To copy the entire list, right-click in the *List View*.
6. Select **Copy whole list** from the options list.
7. Open the Windows application and click the Paste button  . The selection displays in the new application.

Copying the Summary View

You can copy information from the *Summary View* to other Microsoft® Windows® applications.

Note: *The Summary View is not available in a published real-time chart.*

1. Right-click in the *Summary View*.
2. Select **Copy Summary** from the options list.

3. Click the Copy button in the toolbar.

4. Open the Windows application and click the Paste button. The summary information displays in the new application.

Displaying Profile Fields

You can display different information in the *Profile View* by clicking on different components within a chart box. The information shown depends on the custom fields in that box, and whether you have selected to hide any of these fields within the profile. You can also change the order of fields in this view.

Note: *In OrgPlan, planners can modify any data fields displayed in the Chart View. Data fields displayed in the Profile View cannot be modified.*

1. Open the *Profile View* and click on an employee name in your chart. The *Profile View* displays the employee **Name**, **Job title**, and any **Custom Field** information you have added beneath the employee name.

2. Click on a **Box title** in your chart. The *Profile View* displays the box title and any custom field information you have added beneath the box title.

3. Click on a job title in your chart. The *Profile View* displays the job title and any custom field information you have added beneath the job title.

4. You can also choose to show or hide fields in the *Profile View*.

Note: *Profile View hotspots do not work in the published PluginX or Planning charts when the hotspot data points to a data file from the local drive. Web pages, even those served from the local file system, are not allowed to access, open, or otherwise "touch" the local file system. This is a security measure as web pages shouldn't be allowed to do anything with your local files.*

Enable the Hover Profile

1. Select **Format** from the menu and **Chart** from the options list. The Format dialog opens at the **Chart** tab.

2. Scroll down to the **Show Hover Profile** field and select the corresponding check box.

3. Type the time in milliseconds in the **Hover Profile Delay (ms)** field that the mouse cursor must remain in the field before the *Hover Profile* opens. The range is **1000 milliseconds (1 second)** to **20,000 milliseconds (20 seconds)**.

4. Click **OK** to save the change and close the *Format* dialog.

Expanding or Collapsing Levels in Tree View

1. Select **Options** from the Main menu then **Tree View options**.

2. Select **Expand** or **Collapse** from the options list. **Expand** shows each level of information. **Collapse** shows only the top level, with plus (**+**) signs to indicate where additional levels are available. The *Tree View* immediately reflects your change.

Hiding or Showing Icons in Tree View

1. Select **Options** from the Main menu then **Tree View options**.

2. Select **Show icons** from the options list. If **Show icons** is selected, the *Tree View* displays the appropriate icon at each level. If the option is not selected, the *Tree View* displays text only and the connecting lines.

Locating Information in the Chart with Tree View

1. In the *Tree View*, select the person, job, or custom field that you want to find in the chart.

2. Click on that person, job, or custom field.

3. OrgPublisher locates and displays the selected information in the center of the *Chart View* and outline the selected field in red.

Locating Information with the List View

You can locate a person, custom field, or position in the chart using the *List View*. You can also find information in the *List View* by clicking on it in the *Chart View*.

Locate information in the chart:

Click on the name, position or custom field in the *List View* that you want to find. The matching record is highlighted in the chart.

Locate information in the List View:

Click on the name, position, or custom field in the chart. The matching record is highlighted in the *List View*.

Moving and Docking Views

Views can be docked in one place or you can float them in the chart. You can also remove or size views. When creating styles in OrgPublisher, you can select which views should become part of that style. The location and size of the view at publishing time determines what the end user sees in the published chart.

Docking a View

1. Place the mouse pointer on the docking bar portion of the view.
2. Holding the mouse button down, drag the view to the new location.
3. Release the mouse button when you have the view where you want it.
4. You can float the view or dock it on the top, bottom, left, or right of the screen. An outline of the view displays as you are dragging it.

Sizing a View

1. Place the mouse pointer on the edge of the view.
2. Drag to change the size of the view.

Removing a View

- To remove a view from the OrgPublisher window or from a style, you can either:
  - Click on the close button (**X**).
  - Click on the view button in the Views Toolbar.

Pinning the Style View

You can display the list of available styles by clicking the Style View button in the toolbar. The Style bar, which indicates the name of the open chart style, displays just below the menu and toolbars.

Note: *This option is not available if the* ***Show styles in tabs*** *option is enabled.*

1. Click the Style View button  to display the list of styles for the chart.

2. Highlight a style from the list and click on the "pin"  in the upper right corner of the view. This makes the *Style View* easily accessible while you work.

3. When you close the *Style View*, an arrow displays to the right of the style name in the Style bar.

   You can right-click on the Style bar to view the options menu. The **Edit Label** option in both the style and group selectors adds additional text to the existing label name. The original name is never overwritten in the Style bar. The Style bar also displays the **Group** name in the right-hand corner.

Reordering Field Sequence in Profile View

You can reorder the field sequence in *Profile View*.

Note: *The Profile View is not the same as the Hover Profile. Modifications made in one place are not reflected in the other.*

If the *Profile View* contains subheadings, you must also move the subheading and items beneath it.

1. Right-click on a profile field.

2. Select **Configure Profile View** from the drop-down list. The *Configure Profile View* dialog opens.

3. Highlight the field you want to move and click **Move Up** or **Move Down** until the field is where you want it.

Resizing Rows and Columns in Summary View

You can resize the columns and rows in the *Summary View* to fit your chart.

1. In the *Summary View*, place the cursor in the column or row heading on the line separating one column or row from the next. Click and hold down the left mouse button. The cursor changes appearance.

2. Drag the column or row line to the width you want and release the mouse button.

Note: *The Summary View is not available in published real-time charts.*

Resizing the Hover Profile

The *Hover Profile* is a quick way to view the most important employee information without opening the *Profile View*. The pop-up profile is anchored to the upper right or, depending on the location in the *Chart View*, the upper left, of the chart component that the mouse pointer is over.

The *Hover Profile* is style-specific, and end users can access it if you publish a chart with the *Hover Profile* enabled. The *Profile View* is not the same as the *Hover Profile*. Modifications made in one place are not reflected in the other.

1. Hover the mouse cursor over the chart component, person, job, or box , for which you want to resize the *Hover Profile*. When the profile appears, right-click on a field and select **Configure Profile View** from the options list. The *Configure Profile View* dialog opens.
2. In the **Popup View Size** portion of the dialog, use the up or down-arrows to select the pixel size you want for the **Width** and **Height**. You can also type a size between 80 and 600 pixels.
3. Click **OK** to close the dialog and accept the changes. Hover over the data element, box title, job title, or name, again and the *Hover Profile* opens to the new size. All profiles for the same component (person, job, or box) throughout the chart reflect this change.

Setting Default Profile View Fields

Note: *The Profile View is not the same as the Hover Profile. Modifications made in one place are not reflected in the other.*

1. Select **Options** from the Main menu then **Profile View options** from the pull-down menu.
2. Select **Auto display**.
3. Select **Box title** if you want to see just the box title and any assigned custom fields when the *Profile View* is opened.
4. Select **Job Title** if you want to see just the job title and any assigned custom fields when the *Profile View* is opened.
5. Select **Position** if you want to see all the information associated with the position when the *Profile View* is opened.

Showing or Hiding Fields in Profile View

1. Right-click on a field in the *Profile View*.
2. Select **Configure Profile View** from the drop-down list. The *Configure Profile View* dialog opens.
3. Select the check box for the field or subheading you want to show or hide. A check indicates the field is displayed. A blank box indicates that the field is hidden.
4. You can also rearrange the position of each field, or arrange fields to display beneath a subheading, by clicking the **Move Up** and **Move Down** buttons.
5. Click **OK** to close the dialog. The *Profile View* reflects the changes.

Note: *Keep in mind when you choose to show or hide fields that all information you can view in the OrgPublisher chart or search results list is also displayed when you copy the chart to Microsoft PowerPoint or the search results to Microsoft Excel.*

Showing or Hiding Fields in the Hover Profile

1. Right-click on a field in the *Hover Profile*.
2. Select **Configure Profile View** from the drop-down list. The *Configure Profile View* dialog opens at the **Person** tab.
3. Select the tab where you want to modify the fields, **Person**, **Job**, or **Box** then select the check box for the field or subheading you want to show or hide. A check indicates the field is displayed. A blank box indicates that the field is hidden.
4. You can also rearrange the position of each field, or arrange fields to display beneath a subheading, by clicking the **Move Up** and **Move Down** buttons.
5. Click **OK** to close the dialog. The *Hover Profile* reflects the changes.

Sorting the List View

You can sort the data in the *List View* columns alphabetically, numerically, or in date order.

1. Open the *List View* by selecting **View** from the Main menu then **List View** from the options list. You can also click the List View  button in the toolbar.
2. Click on the column heading that you want to sort by. The sort order is retained when you publish the chart. For instance, click on the full name to sort the list alphabetically by last name.
3. Click on the heading for a numeric field, such as telephone number, to sort the list numerically, or on a date column to sort the list by date. The date format must be **YYYY/MM/DD**.

Expanding or Collapsing Levels in Tree View

1. Select **Options** from the Main menu then **Tree View options**.
2. Select **Expand** or **Collapse** from the options list. **Expand** shows each level of information. **Collapse** shows only the top level, with plus (**+**) signs to indicate where additional levels are available. The *Tree View* immediately reflects your change.

Hiding or Showing Icons in Tree View

1. Select **Options** from the Main menu then **Tree View options**.
2. Select **Show icons** from the options list. If **Show icons** is selected, the *Tree View* displays the appropriate icon at each level. If the option is not selected, the *Tree View* displays text only and the connecting lines.

Using the Symbol Indicators in Tree View

Symbols in the *Tree View* indicate whether additional chart components are available for viewing, or that a branch is collapsed into summary format.

Symbols used in the *Tree View*, their function and locations are:

Symbol	Function	Location on the tree
+	A component is collapsed and can be expanded to show more components by clicking on the plus sign.	Corner of the branch connected to the chart component
-	A component is expanded and can be collapsed by clicking on the minus sign.	Corner of the branch connected to the chart component
>	More boxes are available for display by double-clicking the box containing the greater-than sign.	Chart box

Viewing the Hover Profile

1. Move the mouse cursor over a box title, job title, or name in a chart box, and let it hover there for a few seconds. The *Hover Profile* opens.

2. A vertical scroll bar is available if the number of displayed fields requires it. The *Hover Profile* displays the selected chart color scheme.

3. When you have finished reviewing the information in the *Hover Profile*, click somewhere else in the chart to close it.

   You can also select fields to show or hide in the *Hover Profile*, add subheadings, and change the size of the profile.

Open and Run Wizards

Note: *Although this section provides information on manually editing a chart, remember that if you want the changes to remain permanent, you must apply the changes to your HR database. When your HR data is refreshed and you open your chart, your manual changes are overwritten.*

Opening a Wizard

Each OrgPublisher wizard consists of a series of dialogs that guide you through a specific process one step at a time. Some wizards are available from the **Tools** menu or through the *Wizard View*. Some wizards open another wizard. For example when you create a new chart, the *New Chart Wizard* opens the *Style Wizard* so that you can format your chart.

You can access a wizard by following the instructions below.

- **9 Box Matrix Wizard** - opens from the **Tools** menu or when you click the 9 Box Matrix button  in the toolbar (the first time you access *9 Box Matrix*).
- **Automatic Task Scheduling Wizard** - opens from the *Publishing Wizard* or *OrgHistory Archive Wizard* when you select the **Schedule now** option; also available from the *Publish charts* and *OrgHistory Archives* dialogs.
- **Custom Field Wizard** - opens from the **Tools** menu or the *Wizard View*.
- **Head count Wizard** - opens from the **Tools** menu or the *Wizard View*.
- **Hotspot Wizard** - opens from the **Tools** menu, the *Wizard View*, or by clicking on the Insert Hotspot  button and clicking in a chart box.
- **Logo Wizard** - opens from the **Tools** or **Insert** menu.
- **New Chart Wizard** - opens when you select the New  button in the menu or toolbar, or when you select that radio button when you open OrgPublisher.
- **OrgHistory Archive Wizard** - opens from the *OrgHistory Archives* dialog, which opens by clicking the Manage OrgHistory Archives button  in the Main toolbar, or opens from the **Tools** menu.

- **Position Type Wizard** - opens from the **Tools** menu or the *Wizard View*.
- **Photo Wizard** - opens from the **Insert** menu, or by clicking the Insert Photo  button and clicking in a chart box.
- **Print Wizard** - opens the first time you print a chart (using either the **File**, **Print** menu or the Print  button) or every time you print a chart if you choose it in **Print Options** from the **File** menu.
- **Publishing Wizard** - opens from the **Tools** or **File** menu or from the *Wizard View*.
- **Style Wizard** - opens from the **Tools** menu or the *Wizard View*. Also opens from the *New Chart Wizard*.
- **Summary Wizard** - opens from the **Tools** menu or the *Wizard View*.

9 Box Matrix Wizard

Available in OrgPublisher Premier, the *9 Box Matrix Wizard* walks you through selecting fields for the X-axis (horizontal line) of 3 boxes assessing performance and the Y-axis of 3 boxes (vertical line) assessing potential. A combination of the Y and X axis determines the box within the grid where the employee is placed. The top right-most box displays **High Performance**/**High Potential** employees, while the bottom left-most box contains **Low Performance**/**Low Potential**.

In addition to the fields you want to use for analysis, you can also select group and position type filters, range limits, and sort order.

Note: *Records displayed in the 9 Box Matrix are associated with the level displayed in the Chart View.*

With the *9 Box Matrix Wizard*, you can:

Creating a 9 Box Matrix

Defining 9 Box Potential Field Range Values

Defining 9 Box Performance Field Range Values

Selecting 9 Box Filters

Filtering Groups in the 9 Box Matrix

Filtering Position Types in the 9 Box Matrix

Modifying 9 Box Matrix Results

Sorting the 9 Box Matrix

Automatic Task Scheduling Wizard

OrgPublisher provides an *Automatic Task Scheduling Wizard* which enables you to schedule a chart to automatically publish or archive at the selected frequency. You can create a new schedule definition or select from a list of existing definitions.

Task scheduling is accessed when you choose the Schedule now option in either the Publishing Wizard or the OrgHistory Archive Wizard.

With the OrgPublisher *Automatic Task Scheduling Wizard* you can:

Scheduling a One Time Only Job

Scheduling a Daily Job

Scheduling a Weekly Job

Scheduling a Monthly Job

Note: *The OrgPublisher Web Administration Server allows you to publish charts manually. You can, however, open the desktop OrgPublisher version and schedule the publishing definition in the Publish charts dialog using the Web Administration SourceCharts folder.*

Custom Field Wizard

OrgPublisher's *Custom Field Wizard* walks you through the process of manually creating or modifying custom fields in your chart for your organization's data, such as telephone numbers, hire date, salary, etc. You can also attach a hotspot to a specific field using the *Custom Field Properties* dialog.

OrgPublisher can display custom field data extracted from your database. The required layout for org chart information is defined in OrgPublisher's Input File Layout. Custom fields automatically begin in column 20 of this file, and summary custom fields begin in column 26.

The first time a chart is created from data, open the *Custom Field Properties* dialog and assign your custom fields to the appropriate position types.

Note: *Working in OrgPlan, planners can modify any data fields displayed in the Chart View. Data fields you, the administrator, want to keep in the chart, but do not want modified can be displayed in the Profile View. And since planners cannot add or delete custom fields, you still maintain control over the custom fields you decide to use in the chart.*

In OrgPublisher Premier, make sure when importing numeric fields that you do not use any leading symbols, such as dollar signs. Also, verify that decimal places are set the way you want them prior to importing those fields into OrgPublisher. You can add leading and trailing symbols to numeric fields with the Field Format dialog, but the decimal places cannot be adjusted after they are imported.

Create or modify a Custom Field using the Custom Field Wizard:

Note: *If you manually create a custom field and you do not update you HR database, the next time your chart is refreshed, your data will overwrite your manual changes.*

1. Click the Custom Field Wizard  button in Wizard View and click **Next**. You can also select **Tools** from the Main menu then **Custom field Wizard** from the pull-down menu.
2. The first time you create a custom field for your chart, the dialog prompts you to select the **Type** of custom field you want. For instance, select **Email** if you are setting up a group email list. Click **Next**.
3. If custom fields already exist in your chart, select either the **New Custom field** or **Existing Custom field** radio button. Click **Next**.
4. Type the **Label**, or name, for the custom field. Select the **Hide label** check box if you do not want the label to display in the chart. Click **Next**.
5. Click on the *Position Type* to display the custom field in your chart, such as **All Positions** or **Manager**. Select where you want to assign the field, box, job, or name. Click **Next**.
6. Click **Finish**. The custom field displays in your chart.

Note: *Fields 50 - 64 are standard succession planning custom fields provided by OrgPublisher. These labels cannot be changed.*

If the charts you are comparing do not contain a custom Position ID type, OrgPublisher uses the ID in field 5 from the Input File Layout. If neither exist, an error message displays and the comparison does not occur.

In addition new or renamed custom fields will not match when comparing charts and will not be included in the change report.

Head Count Wizard

OrgPublisher provides a wizard to help you create head count populations and summaries in your chart. The *Head Count Wizard* displays a series of dialogs that prompt you for information on who to count, what to name the head count roll-up and which position types will display the roll-up. A head count roll-up is a count of employees per manager, department, etc. You can show or hide the head count label, the actual head count, or the planned head count.

Note: *The use of conditional formatting can affect position type summary totals. See About Conditional Formatting for additional information.*

Show or hide head counts:

1. Click the Head Count Wizard  button in Wizard View and click **Next**. You can also select **Tools** in the menu bar, then **Head Count Wizard** from the pull-down menu.
2. Select the **Population** to include in the roll up. You can select individual position types, **Total Head Count**, or a group, if applicable. Click **Next**.
3. Type the **Label**, or name, for the head count field. Select the Hide label check box if you do not want the label to display in the chart. Click **Next**.
4. Click on the **Position Type** to display the head count, such as **All Positions** or **Manager**. Select where in the position type you want the field displayed. Repeat for each position type. Click **Next**.
5. Click **Finish**. The head count displays in your chart boxes, unless you choose to hide that field, and in the Status bar.

Note: *Orphan records and broken hierarchies can adversely affect summary and security functions. Unexpected results can occur that may cause head count or other totals to be incorrect.*

Succession candidates are not included in head counts or summaries.

Hotspot Wizard

OrgPublisher provides a *Hotspot Wizard* to help you create or modify hotspot links in the Chart View, Profile View, and the *Hover Profile*. These links can point to locations on the Internet, your intranet, or your server. You can also specify a base path for each hotspot rather than a global base path.

Note: *If you want to set up a hotspot e-mail link, do not use this wizard. Use the Custom Field Properties dialog to assign the Email custom field type.*

Create a Hotspot Link

1. Click the Hotspot Wizard  button and click **Next**. You can also click the Insert a Hotspot button  in toolbar and click on a field in a chart box to open the *Hotspot Wizard*.
2. Accept the default **Use the chart's global hotspot base path** option or select the **Specify a base path that is unique to this field** radio button. If you select the latter option, type the lowest level of the path to the directory where the linked document is saved, such as **file://servername/profiles**. Setting the base URL helps you avoid passing in extra or repetitive data. Click **Next**.

Note: *You can also specify a base path for each hotspot when using the Publishing Wizard.*

3. Type the **Target frame name**, if applicable. If you use HTML frames to display the results of a hotspot, specify the target HTML frame name. If you are not using HTML frames, then accept the default, **_parent**. Click **Next**.
4. Select the **Position type** to display the hotspot, such as **All Positions** or **Manager**.
5. Select the position type and field where you want the hotspot shown, such as **Job Title**. Click **Next**.

6. Review the information you have selected, the label, base URL and target frame. If the fields are correct, click **Finish**. Click **Back** if you need to modify data, then repeat these steps and click **Finish**.

Manually Edit a Hotspot Label:

1. Double-click the hotspot label to select it for editing.
2. Type a new hotspot label. Every occurrence of this label is changed.

Manually Edit a Hotspot File Information:

1. Verify that you are in *Build Mode*.
2. Double-click the file information area to select it for editing.
3. Type a new file name.

You can also review additional information on how to:

Access Smart Links from the published chart

Setting a Base URL (Path)

Using a Target Frame

Logo Wizard

OrgPublisher's *Logo Wizard* walks you through adding or modifying the URL for a logo in your org chart. You can also insert a graphic as a watermark or background using the *Format* dialog.

Note: *The Logo Wizard inserts one logo per chart, across all styles.*

Insert a Logo

1. Click the Logo Wizard  button in the Wizard View or select **Insert** from the main menu, then **Logo** from the options list. You can also select **Tools**, then **Logo Wizard**. If you are modifying an existing logo, right-click on the logo. The *Logo Wizard* opens.
2. Type or **Browse** to the **Logo file name**. Click **Next**.
3. If you are deleting a logo, just delete the file name from this field. Click **Next** and proceed to Step 6.

4. To add a logo to your chart, select the alignment you want for your logo from the drop-down **Alignment** list.

5. Select the **Show Logo** check box if you want the logo displayed. (You may create styles that do not display the logo.) A preview of the logo is shown.

6. If the logo is correct, click **Finish**. Click **Back** if you need to change the logo or graphic, then repeat these steps and click **Finish**.

Note: *You can also add special chart backgrounds or color gradients to your chart.*

Logos cannot be hidden in charts, and they are not supported when publishing as an EChart thin client.

New Chart Wizard

OrgPublisher provides a wizard to help you begin creating a new chart. The *New Chart Wizard* can also launch the Style Wizard to help you create your first style.

Note: *Use the ODBC, or Database, option to publish a chart in real-time. If you are creating an ODBC connection for Unifi Thin Client, refer to the Unifi Installation and Configuration Guide provided by the Aquire Professional Services Group.*

Real-time publishing is not available when building a chart from multiple data sources.

1. Open OrgPublisher and select **Run the New Chart Wizard** radio button from the *OrgPublisher* dialog. You can also select **File** from the OrgPublisher menu then **New**, or click the New button in the toolbar. The *New Chart Wizard* opens.

2. Select either the **Organizational chart** or **Succession planning chart** radio button then click **Next**. The *New Chart Wizard* displays a dialog for you to select the source of your data.

3. If you select **Succession planning chart**, see the Creating a Succession Planning Chart in the New Chart Wizard topic for detailed information.

4. Select the button that indicates where you want to get data and click **Next**.

5. Click on a data source option below to access the procedure you need to create an org chart.

Creating an Org Chart from ODBC
Creating an Org Chart from an XML File
Creating an Org Chart from a Text File
Creating an Org Chart from Multiple Data Sources
Creating a Blank Org Chart
Creating an Org Chart from a Unifi Style

6. Follow the wizard prompts for the data source you selected.

Note: *If you are connecting to a Microsoft Excel file, you must create a named range identifying where the data is located within the spreadsheet.*

Detailed information about the input fields can be found in the Input File Layout and Input File Layout Rules sections of this document.

7. Select the **Launch the Style Wizard** check box if you want to format a style. Click **Finish**. The Style Wizard opens.

OrgHistory Archive Wizard

With OrgPublisher you can use the *OrgHistory Archive Wizard* to take a "snapshot" of your organizational chart and archive it for reference at a later time. The wizard walks you through selecting a directory and name for your archive, as well as helps you assign a password or add a signature to the archive.

Note: *You can create a "read-only" archived chart just once a day (using the "One time only" scheduling option). If you want to archive an updated version of your "read-only" chart, you can schedule it to run the next day.*

A "read-only" archived chart can be overwritten with an updated version of the same chart. A message verifies that the end user wants to overwrite the "read-only" archive.

With the *OrgHistory Archive Wizard* you can:

Creating a New Archive Chart

Updating an Archive Definition

Using the OrgHistory Archives Dialog

Note: *If you are working with the OrgPublisher Web Administration server, all archived charts will be created in the server ArchivedCharts folder. In addition, if end users must access archived charts, they must be stored in the SourceCharts folder.*

Photo Wizard

OrgPublisher's *Photo Wizard* walks you through the process of inserting or modifying the URL for photos or graphics in your chart.

Insert a Photo:

1. Right-click on a name if you are working with a planning chart and select **Photo Wizard** from the options list. Select **Insert** from the menu bar, then **Photo** from the pull-down menu. The *Photo Wizard* opens. If you are working with a chart from data, place the photo file name, for example, **jasmith.jpg**, in field 15 of the input file. OrgPublisher opens the *Photo Wizard* when it detects the file name in field 15 of the input file.

   You can also click the Insert Photo button  on the Insert toolbar and click in the box where you want to add the photo. The *Photo Wizard* opens.

2. Type or **Browse** to the **Photo file name**.

3. Type or **Browse** to the **Base photo file path or URL**. If you browsed to the photo file name, the base path automatically displays in this field. The base file path or URL is the path to the directory where the photos or graphics are saved, the lowest level of the path to the directory where the linked document is saved, such as **file://servername/profiles/**.

   OR, if applicable, you can select the **Photos located in the same folder as chart** check box.

4. Click **Next**.

Note: *If a full path is passed in with a photo file in field 15, the base URL is overridden and the full path name is used. You must include the trailing forward slash (/) in the base URL.*

5. A preview of the photo is shown in the last dialog. If the photo is correct, click **Finish**. OrgPublisher inserts the photo or graphic into your org chart. Click **Back** if you need to change the photo or graphic, then repeat these steps and click **Finish**. The photo displays in the selected box.

6. If necessary, resize the photo. By default, this will be the size for all of the chart photos.

7. To update photo properties, select *Build Mode* and then double-click on the photo to open the *Photo Wizard*.

Position Type Wizard

OrgPublisher contains a set of standard position types, such as Manager and Employee. It also provides a *Position Type Wizard*  to help you create your own position types for your chart. For instance, if you want to place a staff function box in an existing chart, you use this wizard to create the new position type. If you are opening a blank chart or a chart that already contains a staff function, that position type is available to select in the wizard. A new position type is saved within your chart file, even if you do not actually save the chart after creating the position type.

You can also use the **Succession Candidate** position type in order to create succession planning charts that do not contain a hierarchy.

You can assign a group, based on a single attribute to create a conditional position type. You can then use conditional formatting to increase visibility of that group in your chart.

Note: *Only Staff Function position types can reside in a Staff Function box.*

The *Position Type Wizard* steps you through changes to an existing position type or through creating a new position type. You can also use the *Define* dialog from the **Edit** menu option.

With the *Position Type Wizard* you can:

Adding a Custom Position Type

Modifying a Position Type

Assigning Conditional Formatting to a Group

Print Wizard

OrgPublisher provides a *Print Wizard* to help you with the page setup for your printed chart. You can print a chart in either a book or wall chart format.

The **Wall Chart** option is ideal for smaller charts that fit on one page, or when printing to a plotter. The **Book Style** option can be modified to print a select number of levels per page, specific chart layouts and more, and includes an index.

You can also refer to the Printing in Wall Chart Style, Printing Your Chart as a Book, or Printing a View procedures for more details.

Print a Chart Using the Print Wizard

1. Select **File** from the Menu then **Print options** from the options list then **Use Print Wizard**. You can also click the Print button in the toolbar. The *Print Wizard* opens.
2. Select the **View to print**, in this case **Org Chart**. Click **Next**.
3. Select either the **Wall Chart** or **Book Style** radio button. Click **Next**.
4. If you want to add or modify a header or footer for your chart, click **Header/Footer** to open the *Print Header/Footer Options* dialog. Make your selections, as detailed in the Selecting Print Header/ Footer Options procedure in this document. Click **OK**.
5. If your chart contains group icons or custom items, you can select the **Include Legend** check box to print a chart legend listing all the icons and colors used in the chart. Click **Finish** to print your chart.

Print the 9 Box Matrix

You can print the *9 Box Matrix* if the *Print Wizard* has been activated. The user will be prompted to print the chart or the 9 Box Matrix View. If the *9 Box Matrix* is maximized, the matrix prints automatically.

Print Graphs

You can print graphs when the *Print Wizard* is enabled. To print a graph, open the *Summary View* and select the **Graphs** tab. Each graph prints one to a page.

Note: *If you print an EChart, you may see a warning message that too many records exist to print the chart. You can print the chart in smaller sections.*

If you attempt to print more than 5000 records in an EChart, a message displays noting that you are exceeding the print limit and the print job is canceled. Select smaller portions of the chart to print. This provides you with more control and prevents you from getting caught in an unwieldy print operation at the end user's browser.

Publishing Wizard

OrgPublisher provides a *Publishing Wizard*  to help you create publishing definitions for your chart. You can choose **Express Mode** for a basic PluginX published chart or **Advanced Mode** to select specific options for your published org chart. The published chart will start either at the top box in the chart, or at a box that you select.

You can also publish a chart for org model (what-if) planning, as well as receive data troubleshooting e-mail messages when publishing to PluginX. For instance, if you publish a chart with a broken hierarchy, this message can notify you of the problem.

If you are publishing a chart for the first time using the **Advanced Mode**, the *Publishing Wizard* presents more dialog choices. You can select several publishing options, each requiring specific steps. You can even choose to enable Section 508 accessibility in your published chart.

Review the Choosing a Publishing Format topic before you are ready to publish. In addition, you should understand whether or not you want to overwrite your existing **HTM** or **JS** file, and if you can use file transfer protocol (FTP). If you publish ECharts, you should also verify whether or not your web server structure uses a virtual directory. Using the EChart publishing option you can also publish in thin client as well as rich client format.

Select a publishing format to review the appropriate *Publishing Wizard* procedure.

Publishing in Express Mode

Advanced Mode

- Publishing in PluginX Format
- Publishing in Graphic Format
- Publishing in HTML Format
- Publishing in EChart Rich Client Format or Publishing in EChart Thin Client Format
- Publishing Real-Time Charts
- Publishing in PDF Format

Style Wizard

You can create multiple styles in OrgPublisher for each chart to vary the display of your chart data and to help format your chart. If you publish your charts with OrgPublisher PluginX, your users can switch styles while viewing your chart. With the *Style Wizard*, you can create a new or change an existing style. You can set styles from within the New Chart Wizard, or create styles later in the chart process.

By clicking the Style Wizard  button in the *Wizards View*, you can create unique styles by:

Formatting Chart Boxes

Applying a Chart Design Template

Note: *Applying a chart design template overwrites any Advanced Box Layout settings you may already have in your chart.*

Saving and Charting Search Results as a Group

Inserting Photos

Showing or Hiding All Options Associated with a Position Type

Securing Styles to a Group

Selecting Drilling Options

Setting Chart Layout Options

Inserting Hotspots

Showing or Hiding Chart Levels or Displaying Chart Styles

Setting the Top of the Chart

Summary Wizard

The *Summary Wizard* walks you through the process of creating summary fields in your chart for numeric data. You can use summary information for reports or what-if planning. You can select how much of this information displays in the Summary View.

Summary fields can include:

- Head counts
- Summaries of numeric data, such as totals, averages, minimum, maximum, or percentages
- Projections that you create in a separate planning session
- Group counts

The *Summary Wizard* provides dialogs to help you insert a summary field. It prompts you for the custom field to summarize, the type of summary, the population for the summary, the name or label you want to assign to the summary, and which position types should display the summary.

Note: *The Summary View is not available in published real-time charts.*

Succession candidates are not included in head counts or summaries.

To add a field or change an existing text field to a numeric field, open the *Custom Field Properties* dialog.

Note: *The Summary Wizard informs you if your chart does not contain numeric custom fields and, subsequently, closes. In addition, the wizard inserts placeholders, if necessary, which display in the Custom Field Properties dialog. These fields within OrgPublisher, occupy sequences 20 -25, as you will note in the Seq. column in the dialog, and are designated as field types other than summaries, such as Text, Hotspot, or Email. As you create summary fields, OrgPublisher starts placing them in sequence 26.*

When importing numeric fields, make sure that you do not use any leading symbols, such as dollar signs. Also, verify that decimal places are set the way you want them prior to importing those fields into OrgPublisher.

You can add leading or trailing symbols to numeric fields with the *Field Format* dialog, but the decimal places cannot be adjusted after they are imported.

Add a Summary Field

1. Click the *Summary Wizard*  button in Wizard View. You can also select **Tools** from the Main menu, then **Summary Wizard** from the pull-down menu. The *Summary Wizard* opens to the first dialog. Click **Next**.

2. Select the existing **Numeric Field to Summarize**. Select the **Type of Summary**. Click **Next**.
3. Select the **Population** to include the summary total. You can choose a specific position type, custom field, total head count, or group. Click **Next**.
4. Type the **Label**, or name, for the summary field. Select the **Hide label** check box if you do not want the label to display in the chart. Click **Next**.
5. Click on the position type to display the summary. Select where in the position type you want the field displayed. Repeat for each position type. You can also select **All Positions**. Click **Next**.
6. Click **Finish**. The summary field displays in your chart.

Creating a Group Summary with the Summary Wizard

Note: *Orphan records and broken hierarchies can adversely affect summary and security functions. Unexpected results can occur that may cause head count or other totals to be incorrect.*

The Summary View is not available in published real-time charts.

In OrgPublisher, you can use the summary feature to generate a group head count.

1. Open the *Summary Wizard* by selecting **Tools** from the Main menu then **Summary Wizard** from the options list. You can also click the Summary Wizard  button in the *Wizard View*. Click **Next**.
2. Select the **Numeric Field to Summarize** and the **Type of Summary**. Click **Next**.
3. Click the drop-down arrow in the **Population** field and select the group name for which you want to create the summary. Click **Next**.
4. Type the summary **Label**. Click **Next**.
5. Select the **Position type** to display the summary field. Click **Next**.

Note: *If you create a group based on a standard position type, such as Manager, then associate a custom position type to the group for conditional formatting, such as Top Performing Manager, the original position type is no longer a part of the group criteria. For instance, if you then searched for all "managers" the*

*"top performing managers" will not be part of your search results because they are now a different position type. Your Boolean search should use both the original position type, Manager, and the new position type, Top Performing Manager, as a criteria using **And/Or**.*

6. Click **Finish**. The new group summary field displays in the *Summary View*.

Note: *In conditional formatting, the search feature and all calculations follow the conditional position type. Formatting follows the group. If you display the Summary View in a chart with conditional formatting, you should hide either the group or position type of the conditional format. If you don't, head counts display in both areas.*

If there is more than one group-based position type for which a person qualifies, the first match is used in Search and Summary tasks.

Inserting a Head Count Roll-up

Before you insert the head count roll-up or while you are creating your position types, you must indicate if the position types are to be counted or not. By default, indirect reports and contractors are excluded from the total head count. You can change this default to include or exclude other position types in the head count.

Note: *Orphan records and broken hierarchies can adversely affect summary and security functions. Unexpected results can occur that may cause head count or other totals to be incorrect.*

1. Select **Edit** from the Main menu then **Define** from the pull-down list. The *Define* dialog displays.
2. Find the *Position type* you want to include in the roll-up and click inside the **Count** field.
3. Select **Yes** from the options list to include the position type in the roll-up or **No** to exclude it. Excluded position types do not affect groups.

You can insert a head count roll-up with the:

Head Count Wizard

Inserting a Head Count Roll-up with the Custom Field Properties Dialog

Note: *In conditional formatting, the search feature and all calculations follow the conditional position type. Formatting follows the group. If you display the Summary View in a chart with conditional formatting, you should hide either*

the group or position type of the conditional format. If you don't, head counts display in both areas.

Succession candidates are not included in head counts or summaries.

Inserting a Head Count Roll-up with the Custom Field Properties Dialog

1. Select **Data** from the Main menu then **Custom Field Properties** from the pull-down menu. You can also click the Custom fields button  in the toolbar. The *Custom Field Properties* dialog opens.
2. Position the cursor where you want to add the new custom field, either somewhere within existing fields, or at the end. Click **Insert**. If you are inserting a field within the list of existing fields, a message verifies that this is what you want to do.
3. Enter the field name in the **Field label** column.
4. Press the **TAB** key to move to the **Type** column and select **Count**.
5. Press the **TAB** key to move to the **Population** column and select the position type or group you want to count. You can select one or more position types or groups, or the **Total Head Count**, or the **Total Planned Head Count**.

Note: *Orphan records and broken hierarchies can adversely affect summary and security functions. Unexpected results can occur that may cause head count or other totals to be incorrect.*

6. Press the **TAB** key to move to the **Assigned To** column. The *Update Displayed Custom Fields* dialog opens. Select the position types or groups for this custom field. If you want all position types to have this field, select **All Positions**.
7. Click **Close** to insert the new head count in your org chart and to close the *Custom Field Properties* dialog.

Note: *In conditional formatting, the search feature and all calculations follow the conditional position type. Formatting follows the group. If you display the Summary View in a chart with conditional formatting, you should hide either the group or position type of the conditional format. If you don't, head counts display in both areas.*

Succession candidates are not included in head counts or summaries.

Resizing Wizard Icons

You can resize the icons used in the Wizard View.

1. Click the Wizard View  button or select **View** from the Main menu then **Wizard View** from the pull-down list. The *Wizard View* opens.
2. Right-click within the view.
3. Select **Large icon** or **Small icon**. The *Wizard View* immediately displays the resized icons.

Showing or Hiding Planned Head Count

Note: *Orphan records and broken hierarchies can adversely affect summary and security functions. Unexpected results can occur that may cause head count or other totals to be incorrect.*

1. Select **View** from the Main menu then **Status Bar** from the pull-down menu. A drop-down list displays the Status Bar options. Each option selected for display is checked.

Note: *Keep in mind when you choose to show or hide fields that all information you can view in the OrgPublisher chart or search results list is also displayed when you copy the chart to Microsoft PowerPoint or the search results to Microsoft Excel.*

2. Select **Planned** to show the planned head count for the displayed portion of the chart. This option adds in the number of open positions displayed in your chart. You can click on the option again to clear it.
3. You can display both the actual and the planned head count at the same time by selecting both options in the option list. **Planned head count** displays to the right of **Shown Head count**.

Note: *In conditional formatting, the search feature and all calculations follow the conditional position type. Formatting follows the group. If you display the Summary View in a chart with conditional formatting, you should hide either the group or position type of the conditional format. If you don't, head counts display in both areas.*

Showing or Hiding the Head Count Label

Note: *Orphan records and broken hierarchies can adversely affect summary and security functions. Unexpected results can occur that may cause head count or other totals to be incorrect.*

You can show or hide the label, or name, of a head count field in two ways.

- When you create or modify a style, you can select the **Hide label** check box in the Head Count Wizard to hide the label in the chart. To show the label, leave the check box blank.

Note: *Keep in mind when you choose to show or hide fields that all information you can view in the OrgPublisher chart or search results list is also displayed when you copy the chart to Microsoft PowerPoint or the search results to Microsoft Excel.*

- Right-click on the label in the Chart View and select the **Hide label** for option. To show the label, right-click on the head count field and select **Show label**.

Note: *In conditional formatting, the search feature and all calculations follow the conditional position type. Formatting follows the group. If you display the Summary View in a chart with conditional formatting, you should hide either the group or position type of the conditional format. If you don't, head counts display in both areas.*

CHAPTER 4

FORMAT YOUR CHARTS

Apply Standard Formatting

Note: *Although this section provides information on manually editing a chart, remember that if you want the changes to remain permanent, you must apply the changes to your HR database. When your HR data is refreshed and you open your chart, your manual changes are overwritten.*

Adding a Chart Background

You can add a background or watermark to your OrgPublisher chart.

1. Click **Format** in the menu then **Chart** from the pull-down list. The **Chart** tab of the *Format* dialog opens.
2. In the right-hand pane, the **Property** column displays both a **Background color** and **Background Image** field. Click in the **Background color Value** field to select a color for your chart background. You can also select **Other** to customize a background color.
3. In the *Color* dialog, you can select one of the **Basic colors**, then modify it by moving your cursor within the color matrix to adjust the **Hue**, **Saturation**, and **Luminosity**. When you have the color you want, as shown in the **Color/Solid** box, click **Add to Custom Colors**. Click **OK** to return to the Format dialog.
4. Click **Apply** to accept the change and continue working in the *Format* dialog or click **OK** to accept the change and close the dialog.

   You can also create a gradient for your chart background color.

Note: *You can either embed an image background or select a background color or gradient for a specific chart. You cannot apply both to the same chart at the same time.*

5. You can add a **Background Image** by clicking on **Embed Image** in the **Value** field. This displays the *Open* dialog which you can use to browse to an image file. Click **Apply** to accept the change and continue working in the Format dialog or click **OK** to accept the change and close the dialog.
6. Select a **File name** and click **Open**. The *Open* dialog closes and the Format dialog displays again.

7. If you want to choose a **Background Style**, click the **Value** field and select **Center**, **Tile**, or **Stretch**. **Center** places your background image in the middle of the chart. **Tile** displays your image (depending on the size) several times, covering the entire background of the chart. **Stretch** modifies your file so that a single image stretches across the entire background of the chart.

8. Click **Apply** to accept the change and continue working in the *Format* dialog or click **OK** to accept the change and close the dialog.

9. If you want the background or background image to print when you print your chart, select the **Print Gradient/Background** check box.

10. Click **Apply** to accept the change and continue working in the *Format* dialog or click **OK** to accept the change and close the dialog.

11. You can delete the background image by clicking **Remove Image**. Click **Apply** to accept the change and continue working in the *Format* dialog or click **OK** to accept the change and close the dialog.

Adding a Style

Note: *You can also select a style from the Chart Design Template using the Style Wizard or by clicking the Chart Design Templates button in the toolbar.*

1. Select **Tools** from the main menu and **Style Wizard** from the pull-down list. If the Wizard View is open, you can also click on the Style Wizard  button. The Style Wizard opens. Click **Next**.

2. Select the radio button to either edit an **Existing Style** or create a **New Style**. Click **Next**.

3. Type a **Style name** or accept the displayed default.

4. Select the radio button to choose the method of creating the style, **Use this wizard to create a new style** or **Make a copy of an existing style**. Click **Next**.

   If you selected to make a copy of an existing style, proceed to Step 7.

5. If you selected to create a new style, select a method to format your chart, **Selecting a chart design template** or **Using the wizard**. Click **Next**. If you select the chart design template option, proceed to Step 13.

6. Choose a radio button for the chart layout you want to use. Click **Next**.

7. Select the radio button for how you want reports displayed in each box, **Report each person on his/her own box**, **Report each person in box with manager**, or **Report each person in the same box below manager**. Click **Next**.

8. Select the position types you want to show or hide in the style. A green check mark indicates a shown position type. A red X indicates a hidden position type. Click **Next**.

9. Select a radio button to use the **Automatic** chart title or to create a **Custom Title**. If you choose to use a custom title, type the name in that field. Click **Next**.

10. Select the **Levels to Display** in the chart. OrgPublisher defaults to "2 levels." Click the down-arrow to modify the default.

11. Select the check box to **Enable Drill-up/Drill-down buttons**, or clear it to hide the drill buttons. Click **Next**.

12. Select the check box next to each view you want to display in the chart. Click **Next** and proceed to Step 16.

13. If you selected the chart design template option in Step 5, the next dialog displays thumbnails of preformatted window layout templates available. Select the format you want then click **Next**.

14. Select the thumbnail that resembles the Chart View you want to see in your chart. Click **Next**.

15. You can click **Back** in order to modify any of your choices, or click **Finish** to close the wizard and open your chart in this style.

Adding Multi-relationship Icons

You can use this feature for matrix reporting to indicate employees who report to more than one supervisor. In order to do this, each employee must have a unique ID in the **ID** field of the *Update Person* dialog. ***This file is "searchable" and, therefore, can be viewed by end users. Do not use sensitive data in this field.*** If you build charts from data, the Input File must contain a unique ID in Field 5. If you build charts manually, you can add the ID using the *Update Person* dialog.

Note: *In the printed version of a book, matrix reporting is indicated by persons appearing multiple times in the index with a page number for each appearance. We recommend that you format indirect relationships differently, such as with a dotted line.*

Using group and multi-reporting relationship icons in conjunction with Conditional Formatting is not recommended. These two features distinguish different aspects of group information and are not meant to work together.

1. Verify that unique IDs exist for each employee. To open the *Update Person* dialog, double-click on a person's name in the chart. If the ID field is empty, add the employee ID.

   If you build charts from data, you can choose to enter this information manually, as stated above, but when your chart is refreshed, this information will be lost. If you want the unique ID to be permanent, you must make the changes in your database.

2. Click **Format** in the Main menu and **Chart** from the pull-down list. The *Format* dialog opens at the **Chart** tab.

3. Click in the **Multiple report icon** field to display the list of existing icons. Click on the image you want or click **Other** to navigate to an icon from another icon resource file.

4. Click **OK**. The dialog closes and the Chart View displays the multiple report icon in the lower-left corner of the boxes.

   You can click on the icon to display the Search View which lists each instance of the person in the chart.

   Multiple reports display separately in the List View for each time they occur in the chart. You can click on an instance of the name to locate the person in the chart.

Applying a Chart Design Template

Note: *Applying a formatting template overwrites any Advanced Box Layout settings you may already have in your chart.*

1. Select **Tools** from the Main menu then **Style Wizard** from the options list. You can also click the Chart Design Templates  button in the Format toolbar. The Style Wizard opens.

2. Follow the wizard prompts until you reach the dialog asking you how you want to create the style.

3. Select the radio button to choose the method of creating the style, **Use this wizard to create a new style**. Click **Next**.

4. Select the **Selecting a chart design template** radio button. Click **Next**.

5. The next dialog displays thumbnails of preformatted window layout templates available. Use the scroll bar to view the available window styles. Select the format you want then click **Next**.

6. The preformatted chart view template thumbnails display in the next dialog. Use the scroll bar to view the available style templates. Select the template you want to use and click **Next**.

7. Follow the remaining dialog prompts and click **Finish**. Your chart displays the selected chart design template.

Note: *The Chart Design tries to match position types in the source chart. If it can't find a position type match then the manager formatting is applied.*

The Web Administration Server chart design templates work if the web administration server (remotserver.dll) and the OrgPub32.exe installed on the server are both the current version. If one of these pieces has not been updated, OrgPublisher cannot pull the data it needs and a blank list of quick formats appears in the dialog.

Chart Design Templates versus Style Wizard

When creating a style for your chart, you can use a *Chart Design Template* or the Style Wizard.

With the Chart Design Templates you:

- get a chart that contains predefined
  - reports displayed in boxes
  - position types that may require formatting
  - automatic chart title
  - number of levels displayed in the chart
  - drilling feature
  - views displayed in the chart
  - color schemes and gradients
  - box shapes

Note: *Applying a formatting template overwrites any Advanced Box Layout settings you may already have in your chart.*

The Chart Design tries to match position types in the source chart. If it can't find a position type match then the manager formatting is applied.

With the Style Wizard you:

- design your style using dialogs in which you select

– which chart layout you want
– how you want the window to look
– how reports are displayed in the chart
– which position types are shown or hidden
– chart title
– how many levels are displayed in the chart
– whether or not to enable drilling
– which views are displayed in the chart

Choosing a Background Image and Style

You can select a background image, or watermark, either from the OrgPublisher folder or from your own library, and then choose a background style.

1. Select **Format** from the Main menu then **Chart** from the pull-down menu. The *Format* dialog opens at the **Chart** tab.

2. Select the style you want to modify from the drop-down list in the left pane of the dialog.

3. Click inside the **Background Image** field in the **Value** column in the right pane, and select an image from the OrgPublisher **Samples>Images** folder. You can also navigate to your company folder to choose a background image. **Embed Image** displays in the field.

4. Click inside the **Background Style** field in the **Value** column, and select from the drop-down list. Choices are **Center**, **Tile**, or **Stretch**.

5. Click **OK** to accept the background choices and view the chart.

   To remove a background image, click **Remove Image** in the **Value** column then **OK**.

Creating a Backup Style

If you have taken the effort to format the chart and create a style you want to use as a standard, it is recommended that you create a backup of that style.

1. Select **File** from the Main menu then **Styles** from the pull-down menu. The *Styles* dialog opens.

2. Select the existing style you want to backup then click **New**. OrgPublisher copies the existing style features into the new style and a new record line displays at the bottom of the list.

3. Select the text **Copy of X style**, and type the name you want to use for the backup style.
4. Add any notes, if appropriate, in the **Notes** area of the dialog.
5. If you are working with a secure EChart, you can secure a style to a group by selecting the group name from the drop-down list.
6. Click **Close**.
7. Select **File** from the Main menu then **Save** from the pull-down menu.

   You can also click the Save button  in the toolbar.

Note: *Keep in mind when you choose to show or hide fields that all information you can view in the OrgPublisher chart or search results list is also displayed when you copy the chart to Microsoft PowerPoint or the search results to Microsoft Excel.*

EChart security works only with an unbroken hierarchy. Orphans within a secured chart will disrupt all security controls.

Creating a Color Gradient and Style

OrgPublisher enables you to create a gradient color and style for your chart background. A gradient is a gradual difference in lightness or darkness of a color. A good example is the color matrix slide in the *Color* dialog.

1. Click *Format* in the Main menu then **Chart** from the pull-down list. The **Chart** tab of the *Format* dialog opens.
2. In the right-hand pane, the **Property** column displays both a **Gradient Color** and **Gradient Style** field. Click in the **Gradient Color Value** field to select a color for the chart background gradient. You can also select Other to customize a background color.
3. In the *Color* dialog, you can select one of the **Basic** colors, then modify it by moving your cursor within the color matrix and the color slide to adjust the **Hue**, **Saturation**, and **Luminosity**. When you have the color you want, as shown in the **Color/Solid** box, click **Add to Custom Colors**. Click **OK** to return to the *Format* dialog.
4. Click **Apply** to accept the change and continue working in the *Format* dialog or click **OK** to accept the change and close the dialog.
5. Click in the **Gradient Style Value** field to select how you want the gradient to display in the chart background. The black and gray tone

images in the pull-down list enables you to display the gradient darker colors on the top, left, horizontal middle, or center of the chart. Click on the image that best illustrates what you want to display.

6. Click **Apply** to accept the change and continue working in the *Format* dialog or click **OK** to accept the change and close the dialog.
7. If you want the color gradient to print when you print your chart, select the **Print Gradient/Background** check box.
8. Click **Apply** to accept the change and continue working in the *Format* dialog or click **OK** to accept the change and close the dialog.
9. You can also add an image to your chart background.

Customizing Drill Buttons

You can modify the shape and color of the drill button to better match your corporate style, making your chart more cosmetically appealing. The customize drill button feature is part of the style format.

1. Select **Format** from the Main menu, then **Chart** from the drop-down list. The *Format* dialog opens at the **Chart** tab.
2. Click on the down-arrow to the right of the dialog next to the **Value** column and scroll down until the **Drill button type** option displays in the **Property** column.
3. Select the **Click to modify** button. The *Customize Drill Buttons* dialog opens.
4. Select the **Use custom drill buttons** check box. The drill button options are enabled.
5. In the **Button Shape** section, click on the down-arrow in the **Outline** field and select the outline shape.
6. Click on the down-arrow in the **Arrow** field and select the arrow shape.
7. In the **Button Color** section, click the down-arrow in the **Foreground** field and select the color of the arrow.
8. Click the down-arrow in the **Background** field and select the outline background color.

   As you make each selection, the **Preview** section in the lower-left hand corner displays a sample of what the drill button will look like.

9. Click **OK** to save and apply your changes to the chart. Click **Cancel** to discard and not use the changes.

Defining and Using Custom Colors

In OrgPublisher you can define custom colors for boxes, backgrounds, and the chart color scheme. You can also define custom colors for a published chart when using the Publishing Wizard.

1. Select **Format** in the Main menu, then **Boxes**, **Lines**, or **Chart** from the pull-down menu. The *Format* dialog displays at the tab that you selected. You can also use the Format Box button  in the toolbar to modify chart boxes, or select **Options** then **Color scheme options**.
2. Select the chart component color option. For box options, you can choose background, shadow, or outline colors. For the entire chart, you can choose a background color.
3. Click to open the color grid and select **Other** to define your custom color. Select the color by clicking in the color areas and using the intensity slide. Click **Add to Custom Colors**. Click **OK**.
4. Click **Apply** or **OK** to display the chart using the new color.

Note: *Custom colors cannot be used with text.*

Deleting a Style

1. Select **File** from the Main menu then **Styles** from the pull-down menu. The *Styles* dialog displays.
2. Select the style you want to delete by clicking to the left of the name.
3. Click **Delete**. The style no longer exists.
4. Click **Close** to return to the chart.

Displaying Chart Styles

If you have created more than one style for your chart, you can quickly view the style list and open a specific style with the Style View.

With OrgPublisher, styles may be secured to groups in published ECharts, which can enhance a secure rich client EChart. In securing styles to groups, you must remember that each chart viewer must have access to at least one style.

Note: *This option is not available if the Show styles in tabs option is enabled.*

1. Click the Style View button in the toolbar or, if you have "pinned" the *Style View*, click the drop-down arrow next to the style name in the Style Bar. The Style Viewdisplays a list of styles available for your chart.
2. Click on the name of the style you want to display. For example, if a style were created to show indirect reports in your organization, you click that style name to display information for indirect reports.

Note: *Keep in mind when you choose to show or hide fields that all information you can view in the OrgPublisher chart or search results list is also displayed when you copy the chart to Microsoft PowerPoint or the search results to Microsoft Excel.*

Deleting a group associated with a style security makes that style available to every EChart user.

Formatting a Custom Field

When you manually create a numeric custom field, you can format that field by selecting the appropriate values. You can also format a date field.

Note: *When importing numeric fields, make sure that you do not use any leading symbols, such as dollar signs. Also, verify that decimal places are set the way you want them prior to importing those fields into OrgPublisher.*

You can add leading and trailing symbols to numeric fields with the Field Format dialog, but the decimal places cannot be adjusted after they are imported. OrgPublisher does not change the value of numeric fields you bring in. For instance, if you import 341.00, that's what the number is in OrgPublisher. If you import 341, that's what OrgPublisher uses. Formatting cannot change the value of the data you import.

Format a numeric field:

1. Select **Data** from the Main menu, then **Custom Field Properties** from the pull-down menu. The *Custom Field Properties* dialog opens.

   You can also use the Custom fields button in the toolbar.

2. Select a numeric custom field then click **Format**. The *Field Format* dialog opens.

3. Type values for the properties that pertain to this field. For example, if the field is a percentage, you can select **%** in the **Trailing Symbol** field.

4. Click **OK** to apply the properties.

Format a date field:

1. Select **Data** from the menu bar, then **Custom Field Properties** from the pull-down menu. The *Custom Field Properties* dialog opens.

   You can also use the Custom fields button  in the toolbar.

2. Select a date custom field then click **Format**. The *Select a date format* dialog opens.

3. Click the down arrow in the **Date Format** field and select the format you want. The options are:
   - **MM/DD/YYYY**
   - **DD/MM/YYYY**
   - **DD.MM.YYYY**

Note: *If you want to use the data formatting (or the search criteria of <>) in Custom Field Properties dialog when building a chart with data, OrgPublisher must receive the data with a 4-digit year then the month and the day; for example, "YYYYMMDD" if you want to change the format to display as "DDMMYY."*

4. Click **OK** to apply the format.

Formatting Chart Boxes

You can define box characteristics individually for each position type to modify a box outline, background color, and style. These modifications are style specific. You can also use the **Advanced box layout** tab if you want to format in greater detail.

Note: *If there is more than one position type within a box, the top position type determines the formatting for the box.*

1. Select **Format** from the Main menu then **Boxes** from the pull-down menu. The *Format* dialog opens at the **Boxes** tab. You can also use the Format boxes  button in the toolbar.

2. Select the specific style you want to modify or, if you want to modify all styles for the chart, select **All Styles**.

3. Click the position type, or **All Position Types**, you want to modify. Only the chart boxes for the selected position types are modified.

4. Change the appropriate values:

Value	Description
Style	Choose a box style for the selected position in the current style. All box styles have background color and several have shadows. Both can be configured using the box options.
Show only text	Select to show text for the position in the current style. This hides the box outline, shadow, and background color.
Width	Type the box width for the selected position type in the current style. If the text is wider than the box width, it wraps automatically. This setting applies to all boxes in the chart. The maximum range is between **5** and **500**. This field must be changed from OrgPublisher's default setting in order to place text outside the boxes using the Advanced Box Layout Editor. Change the width to a number wide enough to accommodate the text.
Height	Type the minimum box height for the selected position type in the current style. If the wrapped text is taller than this setting, the box height automatically increases to fit the text. This setting applies to all boxes in the chart for this position type.
Show outline	Select to show the box outline for the selected position type in the current style; or clear the selection to hide the box outline. If you hide the outline, other box components such as background color and shadow still appear.
Outline width	Type the width of the line surrounding the box for the selected position type in the current style.
Background color	Select a predefined or custom color for the box background for the selected position type in the current style.
Shadow color	Select a predefined or custom color for the box shadow for the selected position type in the current style.
Outline color	Select a predefined or custom color for the box outline for the selected position type in the current style.
Gradient color	Select a predefined or custom color for the box gradient for the selected position type in the current style.
Gradient style	Select a box gradient for the current style from the drop-down list.

Value	Description
Show head count	Select to show the number of filled or open positions in the current style with **Count** set to **Yes** inside the box. To be shown in the count, a person's position type must be defined to show count.
Show group icons	Indicate where you want the group icons to display in the current style, if applicable, in respect to the person's name in the box. Click in the field to display the drop-down list and select **Left**, **Center**, or **Right**.

5. Click **OK** or **Apply**.

Formatting Chart Text

You can format the job title, box title, or name text within a position type for the current style. If you have custom fields for a position type, you can also format that text.

1. Select **Format** from the Main menu then **Text** from the pull-down menu. The *Format* dialog opens at the **Text** tab. You can also use the Format Text button  in the toolbar.
2. Select the specific style that you want to change or, if the change is to be applied to all the styles for a chart, select **All Styles**.
3. Select the position type, for example **Manager**, or **All Position Types**. Select the category you want to format, such as **Box Title**. If applicable, choose the custom field you want to modify.
4. Change the appropriate values. These options may vary, depending on the component you select.

Value	Description
Position Type	This field displays the position type to be formatted in the current style. The position type can also be renamed if a component under the position type is selected.
Show	Shows the selected position type in the current style when the chart is published or in *View Mode*.
Bold	Bolds text in the current style for the selected component of the position type.
Italic	Italicizes text in the current style for the selected component of the position type.

Value	Description
Underline	Underlines the text in the current style for the selected component of the position type.
Text color	Choose predefined or custom color text in the current style for the selected component of the position type.
Align	Aligns (**Left**, **Center**, or **Right**) text in the current style for the selected component of the position type.
Name format	Choose a format to display employee names in the current style for the selected position type; for example **F. Last** indicates first initial, last name.
All caps	Displays text for the selected component of the position type in all capital letters in the current style.
Leading caps	Capitalizes the first letter of each word in the selected component of the position type in the current style.
Leading spaces	Type the number of blank lines to appear above the selected component of the position type in the current style.
Trailing spaces	Type the number of blank lines to appear below the selected component of the position type in the current style.
Label	Type the label for the selected component of the position type in the current style.
Show label	Shows the label for the selected component of the position type in the current style.
Label position	Choose the location of the selected component label, either above or next to the component it describes in the current style.
Show Photo	Shows the photo (if applicable) for the selected position type in the current style.

5. Click **OK** or **Apply**.

Formatting Fonts

The format text option changes the default character attributes of the chart's text. Attributes include font name and point size. A preview sample box displays an example of the text before you assign the attribute.

1. Select **Format** from the Main menu then **Font** from the pull-down menu. The *Font* dialog opens.
2. Choose the font type you want to use.
3. Choose the size.
4. Confirm your selections in the **Sample** area of the dialog.

5. Click **OK**. The new font format displays in your chart.

Formatting Numeric Custom Fields

You can insert a new summary field after you create a numeric custom field. You can format numeric custom fields while or after you add them to your chart.

With OrgPublisher you can choose to suppress zero values in numeric fields. When building from data, OrgPublisher writes (and rewrites as data refreshes) to these fields based on calculations. When selecting a summary field you are prompted to select a field type, for instance **Average** or **Percentage**, and what population you want to include in the calculation. When your chart is republished or refreshed, these data fields may change, depending on your source data.

Custom field types that must be formatted for summary fields include:

- Numeric
- Count
- Currency

Formatting a Custom Field

1. Select **Data** from the menu bar, then **Custom Field Properties** from the pull-down menu. The *Custom Field Properties* dialog opens.

   You can also click the Custom fields button  in the toolbar.

2. Select the custom field you want to format. If the **Type** field does not indicate a numeric selection, click on the field and select the option you want from the drop-down list.
3. Click **Format**. The *Field Format* dialog displays.
4. Click within the **Value** field for each **Property**, then click the drop-down arrow to make your choice.

Note: *When importing numeric fields, make sure that you do not use any leading symbols, such as dollar signs. Also, verify that decimal places are set the way you want them prior to importing those fields into OrgPublisher.*

You can add leading and trailing symbols to numeric fields with the Field Format dialog, but the decimal places cannot be adjusted after they are imported. OrgPublisher does not change the value of numeric fields you bring in. For instance, if you import 341.00, that's what the number is in

OrgPublisher. If you import 341, that's what OrgPublisher uses. Formatting cannot change the value of the data you import.

Property	Value
Leading symbol	Select a symbol that precedes the numeric custom field, for example **£** or **#**.
Trailing symbol	Select a symbol to follow the numeric custom field, for example a percentage sign (**%**).
Decimal places	When using the summary feature in OrgPublisher, you can type the number of digits shown after the decimal.
1000 separator	Select a character to separate thousands within a numeric custom field, for example a comma (**,**).
Negative values	Select a symbol to represent a negative value, for example a minus sign (**-**).
Show negative values	Select this option to display all negative numeric custom fields in red.
Suppress zero values	Select this check box if you do not want to display zero values in your chart.

5. Click **OK** to accept the field properties.

Formatting Reporting Lines

You can not only format reporting lines by relationship, direct or indirect, you can also select line attributes for each position type in the current style. A list of existing position types now displays beneath the **Direct Report** node. An option for **All Position Types** has also been added. The reporting line format is style specific. You can define lines by changing the color or line type, change the thickness of a solid line, and use any standard color for a reporting line.

You can also use the **Advanced box layout** tab if you want to format in greater detail.

1. Select **Format** from the Main menu then click **Lines** from the pull-down menu. The *Format* dialog opens at the **Lines** tab.

2. Click the relationship type to modify. If you want to format by a specific position type, you must expand **Direct Report** then select the position type, or **All Position Types**.

3. Select the position type and change the appropriate values:

Value	Description
Type	Select the reporting relationship for the line you want to format in the current style.
Line Style	Choose a line type for the selected relationship in the current style. If you plan to change the line width, you must select a solid line style. (Microsoft Windows limits dashed lines to one point.)
Width	Type or select a width of the solid connecting line for the selected reporting relationship in the current style. (Microsoft Windows limits dashed lines to one point.)
Color	Choose a predefined or custom color of the connecting line for the selected reporting relationship in the current style.

4. Click **OK** or **Apply**.

Note: *When using conditional formatting , the reporting line format is based on the conditional position type.*

If the first and last report-to box line styles are identical, that style will be used for shared areas. If you do not select a particular line style for the middle boxes, they will always take the default line style (as selected for Direct Reports).

If first and last report-to box line styles are different the default line style (as selected for Direct Reports) will be used for shared areas.

Direct report default line style doesn't refer to All Position Types. It is used only if you don't expand the node.

Formatting the Chart

You can update a chart's box arrangement, background, and default text information at any time. You can do this across all styles or for just one style. In addition you can modify the shape and color of the drill button to better match your corporate style, making your chart more cosmetically appealing. The **Chart** tab in the *Format* dialog displays an easy reference graphic of what each chart layout looks like.

With OrgPublisher you can also open a chart for formatting only, which is very helpful when you are working with a very large chart and you just want to format it. The **Advanced box layout** tab enables you to format in greater detail.

1. Select **Format** from the Main menu then **Chart** from the pull-down menu. The *Format* dialog opens at the **Chart** tab.
2. Select the style you want to modify from the drop-down list.
3. Change the chart layout in the left-hand pane of the dialog, or the property values such as background color, gradient, background/ watermark or font size from the right-hand pane.

Value	Description
Style	Select the style of your chart you want to format.
Layout 1	**Horizontal** - Lowest level of each branch in the chart is arranged in a horizontal line. This creates shorter, wider charts.
Layout 2	**Vertical** - Lowest level of each branch in the chart is arranged in a vertical row. This creates narrower, taller charts.
Layout 3	**Side by side** - Lowest level of each branch in the chart is arranged with the boxes side by side. This creates more compact charts.
Layout 4	**Stacked** - Lowest level of the chart (displays only two levels) is arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level. The number of boxes across is determined automatically or set to a specific number.
Background color	Select or define a color for the chart background.
Gradient color	Select a predefined or custom color for the chart gradient.
Gradient style	Select a chart gradient style from the drop-down list.
Background image	Select an image to use as a chart background, or watermark, by clicking **Imbed Image**. You can also delete an existing background image by clicking **Remove Image**.
Background style	Select the style for the background image from the drop-down list, **Center**, **Tile**, or **Stretch**.
Print Gradient/ Background	Select this check box if you want to print your chart gradient or background.
Multiple report icon	Select an icon to use in the chart to indicate a person reports to more than one supervisor by clicking on the down-arrow and choosing an image. You can also select **Other** to open the *Select an icon* dialog and browse to a different icon source file.

Value	Description
Auto Build	Select an **Auto Build** option to change how reporting employees are shown. Select one of the following options: **Normal** - Each employee in the chart has his or her own box, with its own reporting line. **Reports in one box** - All reporting employees are included in the box of the person they report to. Position types with a zero (0) priority remain in their own box. **Reports in box below** - All reporting employees are included in the same box, with a single line indicating to whom they report.
Horizontal spacing	Type the horizontal space between boxes.
Vertical spacing	Type the vertical space between boxes.
Drill button type	Click on the **Click to modify** button in this field to open the *Customize Drill Buttons* dialog.
Chart font	Select the default font type for the chart text in the current style.
Chart font size	Select the default font size for chart text in the current style.
Automatic row size	Select this check box when using chart layout 4, typically for use in a smaller window, if you want OrgPublisher to automatically set the number of boxes across in a row.
Boxes per row	Type the maximum number of boxes to print in a row. The minimum number of boxes across is **4**. (The chart style is automatically stacked, which means there are two levels of the organization per page and the lowest level is arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level.)
Show Hover Profile	Select this check box to enable the display of the *Hover Profile*. The default is set to off.
Hover Profile Display (ms)	Type the number of milliseconds to hover over the field before displaying the *Hover Profile*. Limits are between **1000** - **20,000**.

4. When you have completed your changes, click **Apply** to add your changes and continue working in the Format dialog. Click **OK** to add your changes and close the dialog.

Formatting the Chart Legend

You can format the chart legend to better fit your chart scheme. The legend default uses a 1 column list, a width of 200 pixels, and a height that is automatically calculated to fit the number of items in the legend.

1. Open the chart legend by clicking the Legend Properties button  in the toolbar or by selecting **Insert** from the Main menu then **Legend** from the options list. If the legend is already displayed in the chart, you can also click on the legend to open it. The *Chart Legend* dialog opens at the **Placement** tab.

2. Select the **Formatting** tab. This tab provides options for outline style, color, gradient, and dimensions, as well as a preview section.

3. In the **Format** section, select the **Outline style** you want to use by scrolling through the available options and clicking on the one you want.

4. Accept the default to **Show outline** for the legend, or clear the check box if you do not want to display the outline.

Note: *If your legend style contains a shadow, the shadow remains despite deleting the outline.*

5. Select the **Outline width** using the up or down-arrow. The allowed range is between **1** - **5** pixels.

6. In the **Use Custom Dimensions** section, select the check box if you want to the legend to be a different size. Using the up and down-arrows for each field, select the **Box width** (range **40** - **999**), **Box height** (range **40** - **999**), **Number of columns** (**1** - **20**), and **Column wrap style**.

Note: *Depending on where you place the legend, some boxes in the chart may be covered. You may want to modify the legend settings to better fit the legend within a blank area of the Chart View.*

7. In the **Color** section, use the pull-down options in each field to select the **Background color**, **Gradient color**, **Gradient style**, **Shadow color**, and **Outline color**.

8. The **Preview** section to the right of the dialog provides a sample of what the legend looks like as you make each change. When you get the format you want, click **OK** to accept the changes and close the dialog.

Formatting the Chart Title

You can format the chart title for the current style separately from the rest of the chart text.

1. Select **Format** from the Main menu then **Title** from the pull-down menu. The *Format* dialog opens at the **Title** tab.

2. Modify or select the appropriate values.

Value	Description
Show chart title	Shows the title at the top of the chart in the current style.
Title width	Type the number of characters across that are allowed for the chart title in the current style. If the title text is wider than the available width, it is automatically wrapped, or divided, into more than one line.
Auto Title	Select to make the chart title of the current style the same as the title of the top box.
Custom Title	Type a title for the chart in the current style. To do this, clear **Auto Title**.
Title font	Select the default font for the chart title in the current style.
Title font size	Select the default font size for the chart title in the current style.
Title color	Select a predefined or custom color for the chart title in the current style.
Title bold	Select to show the chart title in bold text for the current style.
Title italic	Select to show the chart title in italic text for the current style.
Title underlined	Select to underline the chart title in the current style.
Title with AsOf Date	Select to add the current date to the chart title in the current style.
AsOf Date Format	Select to format the date, for example, **MM/DD/YYYY**.
Title Separator	Type the character to use as the chart title and date separator in the current style.

3. When you have completed your changes, click **OK**.

Formatting the Search Dialog

You can format OrgPublisher's *Search* dialog to match the field types in your org chart by:

- altering the tabs or field labels.
- changing the operation between modal and non-modal; either keeping the focus on the *Search* dialog while it is open or letting the focus switch between the dialog and the chart window.
- hiding or reordering search tabs.
- select focus or succession planning options.

1. Select **Options** from the menu bar, then **Search Options** from the pull-down menu and **Customize Search dialog** from the options list. The *Customize Search Dialog* opens.

   There are four columns in the *Search* dialog.

Column Name	Description
Search Page	Lists the type of information contained in each tab of the *Search* dialog.
Tab Caption	Lists the current name of the selected tab in the *Search* dialog.
Field label	Lists the names of the fields within each tab of the *Search* dialog.
Hide	Indicates whether the tab is shown or hidden in the *Search* dialog.

2. Click the tab name in the **Tab Caption** column that you want to change.
3. Type the name that you want over the old name and press **ENTER**.
4. Repeat the process for each **Tab Caption** or **Field label** you want to change.
5. To change the sequence of the tabs, highlight the tab record line that you want to move and click **Move Up** or **Move Down**.
6. If you want the *Search* dialog to always be active while it is open, verify that the **Keep focus on Search dialog (Modal)** check box is selected. In other words, you have to close the *Search* dialog before you can perform a task in OrgPublisher or the published chart.

7. If you want to create a succession planning chart and search for succession candidates, select the **Enable succession planning features** check box. Clear the check box to disable this feature.

8. Click **OK** to accept your change.

9. If you want to use the original tab and field names, click **Restore Default** and click **OK**. This option immediately restores all default headings.

Group and Multi-reporting Relationships Icons

OrgPublisher enables you to select a unique icon to associate with a specific group. The icon displays in the chart box next to the name of each person who is a member of that group. If a person is a member of multiple groups, multiple icons display in the box. When you click on a group icon, the *Search View* opens with a list of all the people in that group.

When choosing an icon for a group, you can add your own icon by opening the Group Editor dialog, clicking the down-arrow in the **Image to show in chart for people in this group** field, and then selecting Other to browse to an icon file.

Note: *Using group and multi-reporting relationship icons in conjunction with Conditional Formatting is not recommended. These two features distinguish different aspects of group information and are not meant to work together.*

See the Using the Chart Legend Properties dialog for details on viewing and displaying a list of group icons used in the chart. See the Printing a Chart Legend for details on printing a legend.

You can also add a multiple relationship icon that displays next to the names of people in the chart who report to more than one person.

If a person reports to only 2 people, you can click on the icon in the Chart View to open the Search View which displays the list of supervisors that person reports to. You can select a name within the list and the Chart View shifts to that particular instance of the person in the chart.

When choosing an icon for multi-relationships, you can add your own icon by selecting **Format** then **Chart**, clicking in the **Multiple report icon** field and browsing to an icon file (.ico).

Note: *You can use 16 bit or 32 bit icons for both the group and multi-relationship icons.*

Hiding Lowest Boxes

You can choose to show text only, not the chart boxes, for the employees in the lowest displayed level of the chart. This hides the lowest level currently displayed, whether it is the actual bottom level of the chart or a level specified using the **Show Custom Levels** option.

1. Select **Format** from the Main menu then **Chart** from the pull-down menu. The *Format* dialog displays at the **Chart** tab.
2. Select the **Hide lowest boxes** check box.
3. Click **Apply** to update the chart and keep the dialog open for further changes, or click **OK** to update the chart and close the dialog.

Inserting a Background Image

In OrgPublisher, you can further enhance your org chart by adding a background image, or watermark. This can be done while you are formatting the chart.

1. In OrgPublisher, select **Format** from the Main menu then **Chart** from the pull-down list. The *Format* dialog opens at the **Chart** tab.
2. In the **Background Image** field, click **Embed Image**. The *Open* dialog appears, enabling you to navigate to your JPG image file. Click **Open**.
3. OrgPublisher returns to the **Chart** tab. Click **OK** to accept the image and exit the dialog, or click **Apply** and proceed to step 4 if you want to continue working in the dialog.
4. If applicable, select a style for the background image in the **Background Style** field. Click the down-arrow and select **Center**, **Tile**, or **Stretch**.
5. Click **OK** to accept the image and exit the dialog, or click **Apply** if you want to continue working in the dialog.

Modifying an Existing Style

1. To modify an existing style, open the style in your chart, make your changes, then select **File** from the Main menu then **Save**. You can also click the Save button  in the Main toolbar.

2. To rename an existing style, open the *Styles* dialog and select the style you want to rename by clicking to the left of the name and then typing over the text.

Opening a Chart for Formatting Only

You can open a chart from the *OrgPublisher* dialog for formatting only.

Note: *Only file types of OCB and ODB can be opened for formatting only.*

1. Open OrgPublisher. The *OrgPublisher* dialog opens to **Create a blank chart**, **Run the New Chart Wizard**, or the default selection, **Open an existing org chart**. Select the chart you want to format and select the **Open chart for formatting only** check box. Click **OK**. You can also select **File** from the OrgPublisher menu, then **Open for formatting only** from the options list.

2. A message states that formatting changes will be saved but data edits will not. Click **OK**.

3. OrgPublisher opens a chart containing a "dummy" hierarchy of 100 boxes and "place holder" text, such as **Manager Box Title** or **Field #16**. No specific data is called, and the **Insert**, publishing, and **Save** As features are disabled. There will be a box representing each position type in your chart.

4. You can modify your formatting and even put fake data in the fields. When you save the chart, only the template is saved and the fake data is discarded.

Selecting Color Schemes for Charts

You can choose a color scheme for your chart, or customize a color scheme, by using the **Options** menu. You can keep this color scheme in your published chart, or select another scheme using the *Publishing Wizard*.

Note: *This option is disabled if you are not running in at least 16-bit color.*

1. Click **Options** in the Main menu and then **Color scheme options** from the options list. The *Select Color Scheme* dialog opens.

2. Select the radio button for the predetermined color you want, such as **Windows system**, **Office**, or **ERP blue**. Proceed to Step 9.

   Or, you can select **Custom color scheme**.

3. If you selected to use a custom scheme, click **Define custom color scheme**. The *Select Color Scheme* dialog opens.

4. Select the color for each gradient by clicking the down-arrow to open the color grid. Fields in the OrgPublisher *Select Color Scheme* dialog include, background and gradient intensity, as well as a Style bar color option.

5. Select **Other** to define your custom color using the Microsoft® Windows *Color* dialog. Select the color by clicking in the color areas and using the intensity slide. Click **Add to Custom Colors**. Click **OK**.

6. You can also **Copy scheme to the clipboard** if you want to propagate the same color scheme to another chart. The code for the color scheme is copied to the clipboard which can be pasted into OrgPublisher.

7. Click **Paste scheme to the clipboard** if you want to paste the code previously copied to the clipboard into another OrgPublisher chart. Click **OK** to close the dialog.

8. If you want to use this color scheme for all charts, select the **Set as default color scheme for new charts** check box in the *Select Color Scheme* dialog.

9. Click **OK** to close the text box and return to the chart.

Note: *Once a color scheme is selected as a default, the check box is disabled when you return to this text box. You only have to select it again if you want to change the default color scheme.*

Setting Chart Layout Options

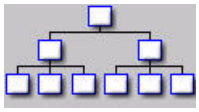
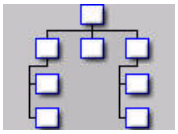
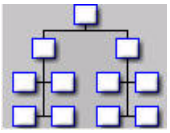
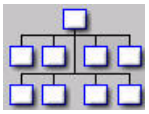
In OrgPublisher, you can update a chart's box arrangement, background, and default text information at any time. You can do this across all styles or for just one style.

Note: *You can further define your chart layout by using the Advanced Box Layout Editor. If you want to change the way the boxes display for printing purposes, use the Print Preview to make those modifications.*

1. Select **Format** from the Main menu then **Chart** from the pull-down menu. The *Format* dialog opens at the **Chart** tab.

2. Select the style you want to modify from the drop-down list.

3. Change the chart layout from the left-hand pane of the dialog. A brief description of how layout works displays at the top of the pane, just above the **Style** field.

Field	Description
Style	Select the style of your chart you want to format.
Layout 1 	**Horizontal** - Lowest level of each branch in the chart is arranged in a horizontal line. This creates shorter, wider charts.
Layout 2 	**Vertical** - Lowest level of each branch in the chart is arranged in a vertical row. This creates narrower, taller charts.
Layout 3 	**Side by side** - Lowest level of each branch in the chart is arranged with the boxes side by side. This creates more compact charts.
Layout 4 	**Stacked** - Lowest level of the chart (displays only two levels) is arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level. The number of boxes across is determined automatically or set to a specific number.

4. When you have completed your layout changes, click **OK**.

Setting the Default Template

Note: *Initial formatting of the successor position type is handled in the default templates shipped with OrgPublisher.*

A default template contains one or more styles and all of the formatting options within those styles.

1. Open the chart that contains the styles you want to use regularly, or create a style that includes colors, views, and data layouts that you want.

2. Select **File** from the Main menu then **Set Template as Default** from the pull-down menu. These styles will be active the next time you open a new chart.

3. To remove a default template, you can either rename or delete the file **Default.OTM** in the OrgPublisher directory.

Note: *There is no option to Set a Default Template when using Web Administration (thin client publishing format) because setting the template on the server would set the same default template for all chart administrators' charts.*

Showing or Hiding Chart Components

You can show or hide specific components in your chart such as an open position, assistants, partners, custom fields, hotspots, or your logo. You can show or hide fields using the *Show/Hide Chart Components* dialog, selecting options in wizards, or by using the right-click menu in views.

Note: *The Show/Hide Chart Components dialog does not apply to position types formatted using the Advanced Box Layout Editor.*

All information you can view in the OrgPublisher chart or search results list is also displayed when you copy the chart to Microsoft PowerPoint or the search results to Microsoft Excel.

1. Select **View** from the Main menu then **Show / Hide chart components** from the pull-down menu. The *Show/Hide Chart Components* dialog opens at the **Components** tab.

   You can also click on the Show/Hide Chart Components button  in the toolbar.

2. Select the **Style** from the drop-down list for which you want to show or hide components. A check mark next to a position type means it is displayed. An **X** means the position type is hidden.

Note: *Keep in mind when you choose to show or hide fields that all information you can view in the OrgPublisher chart or search results list is also displayed when you copy the chart to Microsoft PowerPoint or the search results to Microsoft Excel.*

3. Click the plus sign (**+**) to expand and view the components of a position type.

4. Click on a component to display (green check mark) or hide (red X) it.

5. Select the **Group** displayed in the style from the drop-down list, if applicable. The default group is **Everyone**.

6. Click **Apply** to update the chart and keep the dialog open for further changes, or click **OK** to update the chart and close the dialog box.

Note: *In conditional formatting, the search feature and all calculations follow the conditional position type. Formatting follows the group. If you display the Summary View in a chart with conditional formatting, you should hide either the group or position type of the conditional format. If you don't, head counts display in both areas.*

In addition to hiding components, you can:

Showing or Hiding All Options Associated with a Position Type

Showing or Hiding Fields in Profile View

Showing or Hiding Chart Levels

You can choose to show just a specified number of chart levels, or you can show all levels. You can also hide the lowest level of boxes. When you select a specified number of displayed levels in your chart, you create a custom level. The **Show Custom Levels** menu option displays chart levels using the currently selected top of chart, whether it is the actual top of the chart or an alternate specified with the **Set top of chart** command.

If you are working with a large chart, you may choose to display only a certain number of levels. You can also hide the lowest boxes in a chart.

1. Select **View** from the Main menu then **Show / Hide chart components** from the pull-down menu. The *Show/Hide Chart Components* dialog opens.

   You can also click on the Show/Hide Chart Components button  in the toolbar.

2. Click the **Levels** tab.

3. Select the **Style** you want to modify from the drop-down list.

4. The **Show All Levels** check box is the default selection. In the **Custom Levels** field, select the number of chart levels you want to show in your chart. The default is automatically cleared.

Note: *If you are publishing an EChart , you select the maximum number of levels to display while you are in the Publishing Wizard . All levels is not an option.*

These levels cannot be changed in the published EChart. The drop-down levels toolbar option in the browser contains only the allowable levels.

All information you can view in the OrgPublisher chart or search results list is also displayed when you copy the chart to Microsoft PowerPoint or the search results to Microsoft Excel.

5. Select whether or not you want to display the **Drill-up / Drill-down** buttons.
6. Select whether or not you want to **Drill up custom levels**.
7. Select the number of **Drill up levels**.
8. Select the **Group displayed** in the style from the drop-down list, if applicable.
9. Click **Apply** to update the chart and keep the dialog box open for further changes, or click **OK** to update the chart and close the dialog box.

   Once your chart levels have been set and you are looking at your chart, you can later choose to display all chart levels. Select **View** from the Main menu then **Show All Levels** from the pull-down menu.

Showing or Hiding the Style Bar

You can elect to hide the Style Bar in OrgPublisher by right-clicking on the bar or using the **View** menu option. The default is to display the Style Bar.

Note: *Keep in mind when you choose to show or hide fields that all information you can view in the OrgPublisher chart or search results list is also displayed when you copy the chart to Microsoft PowerPoint or the search results to Microsoft Excel.*

- Right-click on the Style Bar and select **Style Selector button** then **Enable button** from the options list. A check mark indicates that the Style Bar is shown in OrgPublisher. Clear the option to hide the bar.
- You can also select **View** from the Main menu then **Toolbars**, **Styles Toolbar**, and **Show Styles toolbar** from the options menu. A check mark indicates that the Style Bar is shown in OrgPublisher. Clear the option to hide the bar.

Showing the Entire Chart

You can display the entire chart in the Chart View from any location or level within your chart. The **Display whole chart** option is available only after you have invoked **Set top of chart**.

- Select **View** from the Main menu then **Display whole chart** from the pull-down menu.
- You can also click the Display whole chart button  in the toolbar.

OrgPublisher displays as much of the entire chart as the window and the size of your chart allow.

Showing a Portion of the Chart

When you set the top of chart, the selected box and reporting boxes are shown in the *Chart View*. This option is useful for working with company divisions or other areas of an organization, or for printing a portion of a chart.

You can also create styles using the set top of chart feature.

1. Click on the **Box title** where you want the portion of the chart to begin.
2. Select **View** from the Main menu then **Set Top of char**t from the pull-down menu. You can also click the Set top of chart button  .
3. Save the style, or create a new style, using the selecting portion of the chart.

Using the Chart Legend Properties Dialog

The chart legend allows the chart administrator and OrgPlan planners to not only display a list of group icons, but to also create and describe custom colors used in the chart. The legend helps end users understand what the icons and colors mean, and takes the place of OrgPublisher's previous group legend.

When you first enable the legend, all group icons are automatically placed within the legend, which is displayed in a specified corner of the *Chart View*. You can quickly turn the legend on or off by using the toolbar

Legend Properties button , or you can open the *Chart Legend Properties* dialog.

With this dialog, you can set the content, location, and format of the legend. These settings are applied to the current style.

Selecting the Chart Legend Placement

When you open the *Chart Legend Properties* dialog for the first time, the legend is disabled.

1. Open the chart legend by clicking the Chart Legend Properties button in the toolbar or by selecting Insert from the menu then Legend from the options list. If the legend is already displayed in the chart, you can also click on the legend to open it.
2. Select the **Show legend** check box in the **Placement** tab. The *Chart Legend Properties* dialog is now enabled, and the **Contents** and **Formatting** tabs are available.
3. Select the radio button to place the legend in one of the four corners of your chart, **Upper Left**, **Lower Left**, **Upper Right**, or **Lower Right**.
4. If you want to accept the default to display all current icons in the legend, as well as the default legend format, click **OK** to close the dialog. The legend displays in the Chart View in the selected corner.
5. You can also select or add the contents of the chart legend or format the chart legend to fit better with your chart properties.

Note: *Depending on where you place the legend, some boxes may be covered. You may want to modify the legend settings to better fit it within a blank area of the Chart View.*

Using the Define Dialog

The *Define* dialog contains two tabs, one for **Positions** and the other for **Hotspots**.

When building from data, this information is fed into field **4** in the OrgPublisher Input File. You must define certain values when you create a position type.

Value	Definition
Priority	Determines where your custom position types will be placed within a box in relationship to other position types. The lower the priority number, the higher it is placed in the box. OrgPublisher automatically assigns this number, but you can change it from the *Define* dialog.
Count	Determines if the position type is counted in head counts. The default is **Yes**.
Box type	Determines the type of box that is inserted for this position type. Each box type has a different position within the chart. For example, the first assistant box is placed below and to the right of the box to which it reports. If there is more than one assistant, the boxes alternate from right to left below the box to which it reports. Values include: **Normal Box**, **Assistant Box**, **Partner Box**, and **Staff Function Box**

Define a new position type:

1. Select **Edit** from the menu bar, then **Define** from the pull-down menu. The *Define* dialog opens.
2. To create a new position type, click **New**. The last row in the table displays a new position with default information.
3. Highlight the text in the field **Position type** and type the new name. This name is not displayed in the chart, but should be something meaningful to you.
4. You can accept the default or press the **TAB** key to move to the **Count** column and choose whether or not this position will be counted in the head count roll-up.
5. You can accept the default or press the **TAB** key to move to the **Priority** column and select the position priority number.
6. You can accept the default or press the **TAB** key to move to the **Record type** column and select the record type for the position.
7. Press the **TAB** key to move to the **Group** column. Click in the field and select a group from the drop-down list.
8. You can accept the default or press the **TAB** key to move to the **Box type** column and select the chart box type.

Note: *Box type selection cannot be modified when using conditional formatting. The Box type column is disabled once you assign the position type to a group.*

9. Click **Move Up** or **Move Down** to reposition the position type in the dialog. (This does not affect the order of position types in the chart boxes.)

10. Click **OK**. The *Define* dialog closes and the file is saved. If this is a new file, you will be prompted to save the file before you can continue.

Modify an existing position type:

Select the **Position type** name, and follow Steps 3 - 10 above.

Note: *When using conditional formatting, it is best to assign a single attribute group to an appropriately named position type, such as "High Performing Managers."*

Using the Multi-level Peer Display

OrgPublisher provides the option to display all reports at the same chart level or display multiple levels. This option is a formatting function, displays in *View Mode* only, and can be useful if you have, for instance, a Vice President and a manager reporting to the same box and you want to show the hierarchy level of the two positions.

Note: *The multi-level peer display does not work when your chart contains multiple people in a box.*

When building a chart with data, map your levels to the OrgPublisher Input File field 18. Boxes reporting to an assistant will not have this functionality. You can also save the multi-level peer display as a separate style or use the menu or toolbar options to manually adjust box levels.

Note: *If you are working with a large chart that takes a little longer to open, you may want to turn off the multi-level viewing. This will speed up the process. Select View from the menu bar and clear Show multi-level peers option in the pull-down list.*

Planning charts are always in Build Mode, and do not reflect special formatting, such as multi-level peer display, reports in the same box as their manager, or the advanced box layout settings.

Manually move a box up or down a level:

Note: *Although this section provides information on manually editing a chart, remember that if you want the changes to remain permanent, you must apply*

the changes to your HR database. When your HR data is refreshed and you open your chart, your manual changes are overwritten.

1. Select **View** from the Main menu and verify that **Show multi-level peers** in the pull-down list is selected.
2. Click View Mode  in the tool bar.
3. Highlight the name or job title of the box you want to move.
4. Click the Move up  or Move down  button. The box displays at the new level.
5. You can also select **Edit** from the Main menu then **Move up a level** or **Move down a level** from the pull-down menu.
6. Save your chart.

Some things to note about the Multi-level Peer display feature:

- Works in *View Mode*.
- The top box cannot be moved.
- The first level below the parent box does not move up because it is already at the highest level in relation to the parent box.
- If you move a parent box, all reporting boxes move with it.
- Partners move with their attached boxes.
- You can move (up or down) 10 levels in relation to a parent box.

Viewing Available Styles

If you have created more than one style for your chart, you can quickly view the style list with the Style View.

Note: *This option is not available if the Show styles in tabs option is enabled.*

1. Click on the Style View button  in the toolbar or, if you have pinned the *Style View*, click the drop-down arrow next to the style name in the Style bar.
2. The *Style View* opens on the left side of the OrgPublisher window.

3. Select the style from the list by selecting the tab in the Style bar (if available) or by clicking on the style name.

Add and Format a Chart Legend

Adding a Custom Item to the Chart Legend

When you enable the chart legend in your chart, you can select the placement of the legend, format the legend, and select the contents of the legend. You can also add custom item color and gradient icons to include in the legend.

Note: *Depending on where you place the legend, some boxes may be covered. Using click and drag scrolling can help, but modifying the legend settings to fit it within a blank area of the Chart View may be a better solution.*

1. Click on the legend in the Chart View. You can also click the Legend Properties button  in the toolbar. If the legend is already displayed in the chart, you can also click on the legend to open it. The *Chart Legend Properties* dialog opens.

2. Click the **Contents** tab.

   When opening the *Chart Legend Properties* for the first time, all icons in the chart are displayed in the legend. These icons are listed in the Legend contents section of the dialog. As you create new groups with icons or custom items, they display in the **Available groups** section of the dialog. The **Preview** section shows you what the legend currently looks like.

Note: *The Chart Legend Properties dialog does not display groups that do not have an icon assigned to them.*

In addition, it's best not to give custom items the same names as groups. Custom legend items and groups that have the same name do not synch.

3. Click **Add Custom Item to Legend**. The *Add New Custom Item* dialog opens.

4. Type the **Label** for the new icon, limited to 64 characters.

5. Select a **Color** using the down-arrow to open the color grid.

6. If applicable, select the **Gradient style** using the down-arrow to select a gradient style thumbnail.

7. If applicable, select the **Gradient color** using the down-arrow to open the color grid.

8. Click **Add**. The new icon is automatically added to the **Legend contents** section of the dialog.

Modifying Icon Properties

1. Select the custom item icon in the **Legend contents** tab to enable the Properties button  . you can modify custom legend icon properties only. Properties for a group icon can be modified only in the *Group Editor* dialog.

2. Click the Properties button  to open the *Modify Icon Properties* dialog.

3. Modify the custom icon settings as needed, **Label**, **Color**, **Gradient style**, **Gradient color**.

4. Click **OK** to accept the changes and close the dialog. The modified icon displays in the **Legend contents** and **Preview** sections of the dialog.

Formatting the Chart Legend

You can format the chart legend to better fit your chart scheme. The legend default uses a 1 column list, a width of 200 pixels, and a height that is automatically calculated to fit the number of items in the legend.

1. Open the chart legend by clicking the Legend Properties button  in the toolbar or by selecting **Insert** from the Main menu then **Legend** from the options list. If the legend is already displayed in the chart, you can also click on the legend to open it. The *Chart Legend* dialog opens at the **Placement** tab.

2. Select the **Formatting** tab. This tab provides options for outline style, color, gradient, and dimensions, as well as a preview section.

3. In the **Format** section, select the **Outline style** you want to use by scrolling through the available options and clicking on the one you want.

4. Accept the default to **Show outline** for the legend, or clear the check box if you do not want to display the outline.

Note: *If your legend style contains a shadow, the shadow remains despite deleting the outline.*

5. Select the **Outline width** using the up or down-arrow. The allowed range is between **1** - **5** pixels.

6. In the **Use Custom Dimensions** section, select the check box if you want to the legend to be a different size. Using the up and down-arrows for each field, select the **Box width** (range **40** - **999**), **Box height** (range **40** - **999**), **Number of columns** (**1** - **20**), and **Column wrap style**.

Note: *Depending on where you place the legend, some boxes in the chart may be covered. You may want to modify the legend settings to better fit the legend within a blank area of the Chart View.*

7. In the **Color** section, use the pull-down options in each field to select the **Background color**, **Gradient color**, **Gradient style**, **Shadow color**, and **Outline color**.

8. The **Preview** section to the right of the dialog provides a sample of what the legend looks like as you make each change. When you get the format you want, click **OK** to accept the changes and close the dialog.

Selecting the Contents of the Chart Legend

When you enable the chart legend in your chart, you can select the placement of the legend, format the legend, and select the contents of the legend. You can also add or modify custom items in the chart legend.

Note: *Depending on where you place the legend, some boxes may be covered. You may want to modify the legend settings to better fit it within a blank area of the Chart View.*

1. Click on the legend in the *Chart View*. You can also click the Legend Properties button  in the toolbar. The *Chart Legend Properties* dialog opens.

2. Select the **Contents** tab.
   When opening the *Chart Legend Properties* for the first time, all icons in the chart are displayed in the legend. These icons are listed in the **Legend contents** section of the dialog. As you create new groups with icons or custom items, they display in the **Available groups** section of the dialog. The **Preview** section shows you what the legend currently looks like.

3. Select a group or custom item from the **Available groups** section and click **Add selected group to legend**. The selected icon moves to the **Legend contents** section, and you can see it in the **Preview** section.

4. Click **Move up** or **Move down** to change the sequence of the list in the Legend contents section.

5. Click Remove an icon  button to remove a group icon from the contents area and move it to the **Available groups** section.

6. Click **Add Custom Item to Legend** to add an additional custom color to the legend. When you add the new icon to the contents section, double-click on the item to enable the Set icon properties button  . Click the button to **Modify Icon Properties**. You can also delete a custom color icon with the Remove an icon  button.

Note: *When you delete a custom icon, it is immediately discarded. The icon and color information is not saved.*

7. Click **OK** to accept the changes and close the dialog.

Advanced Box Layout Editor

With OrgPublisher you can use the *Advanced Box Layout Editor* to display more information more concisely. The advanced box layout provides more flexibility in displaying information in the chart box, such as the use of columns, and helps you conform to your existing documentation standards.

Here are some tips to remember when using the *Advanced Box Layout Editor*.

- If your chart already contains *Advanced Box Layout Editor* settings, and you select a chart design template, the *Advanced Box Layout Editor* settings are overwritten and lost.
- The *Advanced Box Layout Editor* is designed to change the chart box layout. Any other formatting done, such as changing the font color, is not affected when you choose to **Copy** or **Reset** the layout.
- You can use the *Advanced Box Layout Editor* in both the *Build Mode* and *View Mode*, however the changes can be seen only in the *View Mode*.
- If you want to place data outside the box in the chart, you must first adjust the width of the box using the **Boxes** tab of the *Format* dialog.
- When centering a field within a box, drag the field width to match the box width in the layout editor.
- The layout editor box perimeters hold three zones, one each for **Box Title**, **Job Title**, and **Name**. Custom fields, which are associated with one of these components, can be moved only within the assigned component's zone.
- If there are multiple people in a box, the *Advanced Box Layout Editor* sorts by the position type priority as noted in the *Define* dialog.
- When setting the box layout to display custom fields side-by-side, you cannot arrange the **Box Title**, **Job Title**, and **Name** to display side-by-side.
- You can move a custom field only within the associated component area of the *Advanced Box Layout Editor*. For instance, if a field is associated with the name, you can move the field only within the area designated for the name.
- Fields will wrap only if the field is tall enough to hold the wrapped text.

- When changing the layout or editing custom fields, remember that they have both a **Label** and a **Data** component. You must select the component of the custom field you want to modify.

Note: *At this time, the Advanced Box Layout Editor does not display people under individual job titles when you rearrange the box, name, or job fields and there are multiple people in a box.*

The Show/Hide Chart Components dialog does not apply to position types formatted using the Advanced Box Layout Editor.

Planning charts are always in Build Mode, and do not reflect special formatting, such as multi-level peer display, reports in the same box as their manager, or the Advanced Box Layout settings.

Use the Advanced Box Layout Editor

1. Select **Format** from the Main menu then **Advanced box layout** from the options list. The **Advanced box layout** tab opens displaying a single check box. You can also right-click in the chart, select Format from the menu list then **Advanced box layout**.
2. Select the **Use advanced box layout for this position type** check box. The layout options display in the dialog.
3. Choose a style you want to format from the pane on the left then choose a position type within the style.
4. Select one of the fields to edit: **Box Title**, **Job Title**, or **Name**. In the above example, the job title is selected. The type of field you select, data, or label, displays in the bar at the bottom of the dialog.
5. If you add many fields to the chart box, the box layout editor may display a message at the bottom of the list box, for example, The box is taller than this window. Please expand the window height. You can increase the size of the **Advanced box layout** by clicking on the tab borders and dragging the dialog borders to the length and width you need.

Succession Candidates and Advanced Box Layout Editor

The first example uses a group created to show succession candidates who are designated to succeed more than one position.



Figure 106

The second example uses a succession group created to find managers with no successors.

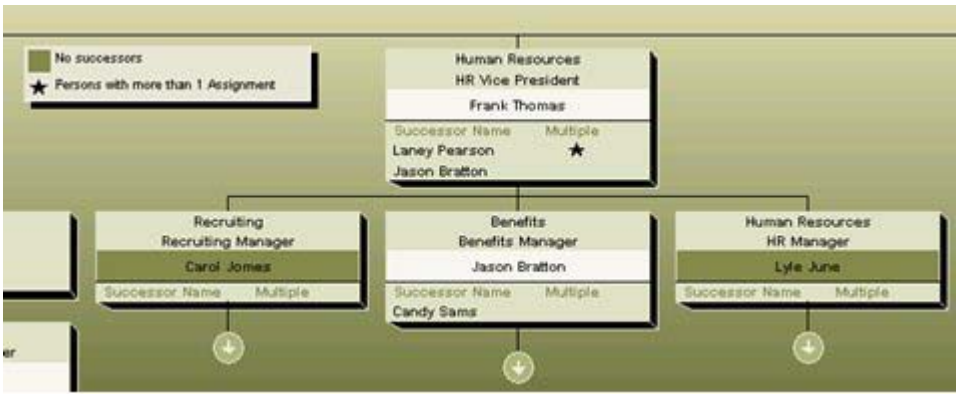


Figure 107

Tasks you can perform with the Advanced box layout:

- Adding Items to a Box Layout, including vertical and horizontal lines.
- Adding a Background Color to a Box Area or field within a box.
- Arranging Sections in the Box Layout.
- Copying the Box Layout to Another Position Type.
- Displaying Information Outside the Chart Box.
- Reviewing List Items in the Box Layout.
- Resetting the Box Layout tab to the default settings.

Adding a Background Color to a Box Area

Within the Advanced Box Layout Editor, you can add a background color to a box area. You can also make the area color conditional, based on a selected group.

1. Select **Format** from the Main menu then **Advanced box layout** from the options list. The *Format* dialog opens to the **Advanced box layout** tab displaying a single check box.
2. Select the style, if applicable, and the position type you want to modify.
3. Select the **Use advanced box layout for this position type** check box. The advanced box layout options appear.
4. Click **Add**. The *Add Item to Layout* dialog opens.
5. Three types of fields are available, **Box field**, **Job field**, and **Name** field.

   The **Box field** and **Job field** contain options to select the box or job title, the box or job label, a horizontal line, or a vertical line. The **Name field** contains all the custom fields as well as the label, horizontal or vertical line, and group or multiple report icons.

   The **Background area** option is available in each field type.
6. Select **Background area** in the field type you want, such as **Name field**.
7. Click **Add item**. The item is added to the box layout editor.
8. Click the background borders, or perimeters, and drag them to modify the area size for the color or gradient you want to add.
9. Double-click on the background area to open the Background Area Properties dialog.
10. You can select a **Default color** for the area, as well as a gradient style and color. You can also select a custom color by selecting **Other** in the color palette dialog.
11. Select the **Apply conditional color** check box to fields within groups. In the case of a member of more than one group, the order of the group selected in the dialog is the order in which the color is applied in the chart.
12. Click the down-arrow to select the **Group**, **Color**, **Gradient style**, and **Gradient color**.

13. Click **OK** to close the dialog.
14. Continue with the *Advanced box layout editor* or click **OK** to close the editor.

Adding Items to a Box Layout

Within the Advanced Box Layout Editor, you can add items to the box layout in the current style by field, as well as align and format the text of those items.

1. Select **Format** from the Main menu then **Advanced box layout** from the options list. The *Format* dialog opens to the **Advanced box layout** tab displaying a single check box.
2. Select the style, if applicable, and the position type you want to modify.
3. Select the **Use advanced box layout for this position type** check box. The **Advanced box layout options** appear.
4. Click **Add**. The *Add Item to Layout* dialog opens. Three types of fields are available, **Box field**, **Job field**, and **Name field**.

   The **Box field** and **Job field** contain options to select the box or job title, the box or job label, a horizontal line, or a vertical line. The **Name field** contains all the custom fields as well as the label, horizontal, or vertical line, and group or multiple report icons.

   See the Adding a Background Color to a Box Area procedure for detailed information on applying conditional colors.
5. Select the field or line you want to add, such as a photo, email address, or a horizontal line. If you want the field label, as well as the field data, to display in the box, select the **Automatically add label item** check box at the bottom of the list box.
6. Click **Add item**. The item is added to the box layout editor.

Arranging Sections in the Box Layout

Within the *Advanced Box Layout Editor*, you can arrange the order of fields within the chart boxes in the current style.

1. Select **Format** from the Main menu then **Advanced box layout** from the options list. The *Format* dialog opens to the **Advanced box layout** tab displaying a single check box. If you have already used the **Advanced box layout** tab for this chart, the layout options already display.

2. Select the style, if applicable, and the position type you want to modify.
3. Select the **Use advanced box layout for this position type** check box. The advanced box layout options display in the right-side of the tab.
4. Click **Arrange**. The *Arrange Sections* dialog opens.
5. Select the radio button that describes the order in which you want the field sections to display in the chart box.
6. Click **OK**. The list box closes.
7. Click **OK** in the **Advanced box layout** tab. The *Format* dialog closes and the field sections are rearranged for the position type you selected.

Copying the Box Layout to Another Position Type

Within the Advanced Box Layout Editor, you can copy the advanced box layout of one position type to another position type in the current style.

1. Select **Format** from the Main menu then **Advanced box layout** from the options list. The *Format* dialog opens to the **Advanced box layout** tab. Since you have modified a layout previously, the **Use advanced box layout for this position type** check box is already selected and the advanced box layout options are displayed.
2. Click on the style, if applicable, and the position type layout you want to copy.
3. Click **Copy layout**. The *Copy Box Layout* dialog opens.
4. Select the style, if applicable, and the position type to which you want to copy the layout.
5. Click **Copy**. A message notifies you that the layout has been copied successfully.
6. Repeat steps 2 - 5 if you want to copy the layout to multiple position types, or click **Close** to exit the list box.

Displaying Information Outside the Chart Box

Within the *Advanced Box Layout Editor*, you can modify your org chart to display information outside of the chart box.

While the actual width of the chart boxes is controlled in the Boxes tab of the Format dialog, you can use the layout editor to manipulate the box and place the text outside.

1. Select **Format** from the Main menu then **Boxes** from the options list. You can also select the Format Boxes button  in the toolbar. The *Format* dialog opens to the **Boxes** tab.
2. Modify the **Width** field to accommodate the length of the field you want to place outside the chart box. Click **Apply**.
3. Select the **Advanced box layout** tab. If you have not yet used this feature, the tab opens to display a single check box. If you have already used the **Advanced box layout** tab for this chart, the layout options already display in the right-hand pane.
4. In the left-hand pane, select the style, if applicable, and the position type you want to modify.
5. If not already checked, select the **Use advanced box layout for this position type** check box. The advanced box layout options display in the right-hand pane.
6. The box area displays with either the default fields, or the fields you have previously selected, within the box outline. OrgPublisher's default fields are **Box Title**, **Job Title**, and **Name**.

   Add or **Arrange** items in the layout. Do so before you place the field outside the box.
7. Select the field you want to place outside the box and drag it to the right-side of the box outline. Verify that field labels and information do not overlap. Adjust the box width in the **Boxes** tab again, if required.
8. Click and drag the box borders, or perimeters, to resize the chart box until the field you want to display outside the box now sits outside the box perimeter.

   The area of the box that will display in the chart is outlined with a darker border. The area you can work with to display your text outside the box shows in gray-scale. Connecting lines also display as dark lines within the gray-scale area so that you can verify their positions in relation to your field. If the layout is what you want, click **OK**.
9. The *Format* dialog closes and the text field displays outside the box for the selected position type.

10. Repeat steps 2-8 if needed to properly adjust the location of the field, box perimeters, and connecting lines.

Resetting the Box Layout

Within the Advanced Box Layout Editor, you can choose to reset the box layout to the default settings.

Note: *This Reset feature deletes ALL formatting done in the Advanced box layout tab, not just in the current instance. Do not use this feature as an "undo" button.*

1. Select **Format** from the Main menu then **Advanced box layout** from the options list. The *Format* dialog opens to the **Advanced box layout** tab displaying the current advanced settings.
2. Click **Reset**. A message displays verifying that you want to lose all the current settings and revert back to the default settings in the chart.
3. Click **Yes** if you do or **No** if you want to leave the settings as they are or adjust them individually.

Reviewing List Items in the Box Layout

Within the *Advanced Box Layout Editor*, you can review a list of items in the box layout in the current style. Selecting an item is the same as selecting it within the layout tab.

1. Select **Format** from the Main menu then **Advanced box layout** from the options list. The **Format** dialog opens to the **Advanced box layout** tab displaying a single check box. If you have already used the **Advanced box layout** tab for this chart, the layout options are enabled.
2. Select the **Use advanced box layout for this position type** check box. The advanced box layout options appear.
3. Click **List items**. The *Box Layout Items* dialog opens. The three sections of the layout editor appear, **Box field section**, **Job field section**, and **Name field section**. Data and information fields added using the *Add Item to Layout* dialog display within each section.
4. Click **Done** to close the list box and return to the **Advanced box layout** tab

Using Auto Build with Advance Box Layout Editor

When using **Auto Build** with the Advanced Box Layout Editor:

1. Select **Format** from the Main menu then **Chart** from the pull-down menu. The *Format* dialog opens to the **Chart** tab.
2. In the **Auto Build Value** field, select **Reports in one box**.
3. Click **OK**. OrgPublisher places the positions in the chart as specified.

   If custom position types vary within the direct reports, they must all be formatted the same using *Advanced Box Layout Editor*. This feature can be used to display information in a spreadsheet format.

   Custom field data is associated with the name field. No job title or box title is displayed for the **Employee** position type in this example. If it is displayed, the job title or box title would appear on the line above or below each name, never horizontally.

Note: *When building a chart automatically, Auto Build assumes that each record has a unique box ID.*

Using Advanced Box Layout with Organizational Model Planning

You, the chart administrator, can now use the *Advanced Box Layout Editor* to format charts for planning (OrgPublisher Premier) purposes.

When editing within a planning chart, you may need to select a box which, in turn, selects the span of control beneath that box. Because *Advanced Box Layout* formats allow the placement of the name or job title at the top of the box, a selection button has been added.

Note: *The administrator must change the Open position label position type in the source chart if you want to allow planners to modify the field. You can change the name to read Open position instead.*

When the user places the mouse pointer over the top right corner of the box, the selector is available  . When this is visible, click to select the box and its span of control.

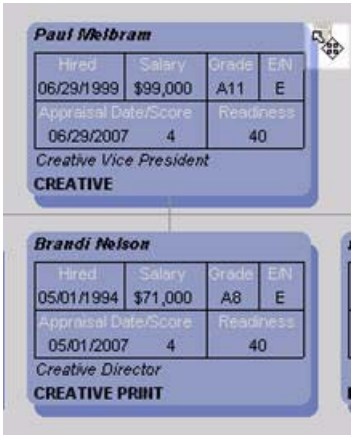


Figure 108



Figure 109

Use Conditional Formatting

Assigning Conditional Formatting to a Group

Conditional formatting answers your need to graphically represent a particular search criteria by box and text formatting, and, if applicable, show more data in the boxes of the group with that single attribute. You do this by creating a conditional position type and assigning it to your single attribute group.

Note: *Published real-time charts provide single field searching capabilities; complex or group searching and saving My groups are not available.*

Conditional formatting is not designed to display summaries or counts, nor will it replace the original position type assigned when you created the chart. Conditional position types apply across all styles.

1. Click the Position Type Wizard button  in the Wizard View, or select **Tools** from the Main menu then **Position type Wizard** from the drop-down list. The Position Type Wizard opens. Click **Next**.
2. Select the **New Position Type** radio button. Click **Next**.
3. Type the conditional **Position Type name**. It is recommended that you do not name the position type the same name as the group.

Note: *Conditional formatting does not "erase" the original position type assigned, such as Manager or Assistant. The box type remains associated with that original position type. For instance, if an Assistant falls into the conditional group and you change the position type (a formatting feature only), the box type remains as an Assistant box. This will be apparent while working in the OrgPublisher application but not in the published, or PluginX chart. In the application, open the Update Person dialog to view the original position type.*

You can address this by naming the conditional position type to reflect the original position type name, such as "Top Performing Manager" or "Highest Ranked Assistant."

4. Assign a **Group** to the position type by clicking on the drop-down arrow and selecting the ***single attribute group*** you want to highlight in your chart. Click **Next**.

Note: *It is recommended that you do not select a group that references secure fields if you plan to publish a secure thin client EChart because you will receive undesirable results.*

The rich client EChart summary counts using conditional formatting show numbers calculated as if all fields are visible to the end user. This is because EChart summaries are calculated at publishing time and cannot be recalculated.

If there is more than one group-based position type for which a person qualifies, the first match is used in Search and Summary tasks.

5. Indicate if it is included in the total **Head count** by selecting the **Yes** or **No** radio button. Click **Next**.

Note: *Summary counts are based on the position type, as is the Search feature. Formatting will follow the group assigned to the conditional position type.*

6. Type or select a **Record Type** code for this position. Click **Next**.

Note: *Record types for custom position types should use brackets, for example <T>.*

7. Click **Box Style and Color** to open the *Format* dialog to the **Box** tab. Choose the style of the chart box and the box color. Click **OK**.
8. Click **Text Style and Color** to open the *Format* dialog to the *Text* tab. Choose the text color, alignment, etc. Click **OK**. Click **Next**.
9. Click **Finish**. The new position type is saved within your chart file, even if you do not actually save the chart after creating the position type.
10. Open the *Custom Field Properties* dialog. The original formatting and custom fields are removed from the boxes included in the new conditional position type. You must now reassign custom fields to the conditional position type.
11. Select the custom field you want to assign to the conditional position type and click in the corresponding **Assigned To** field. The *Update Assigned Custom Fields* dialog opens.
12. Select the conditional **Position type** from the list. A green check mark displays next to the name.
13. If you want the custom field assigned to a particular component, select **Box title**, **Job title**, or **Name**.
14. Click **OK**. The *Update Assigned Custom Fields* dialog closes.
15. Click **Apply** in the *Custom Field Properties* dialog. Click **Close** to exit the *Custom Field Properties* dialog.

Note: *When using conditional formatting to create a position type group for Employees (record type E), the search results include both direct (E) and indirect employees (IE). If you need to separate the direct from indirect employees you can add additional logic to the Group Editor description of the group, such as:*

OR PositionType = Employee

AND PositionType <> Indirect Report

CHAPTER 5

SEARCH YOUR CHARTS

Note: *Published real-time charts provide single field searching capabilities; complex or group searching and saving My groups are not available.*

By default, OrgPublisher is set to display the top of chart box if no results are found for a search. If you conduct a search that results in a blank Chart View, verify that the group option default is set. Select Options from the Main menu, Group display options, and then Auto adjust display to show group.

When working with a published EChart, you can add new groups, but the existing groups cannot be modified or deleted. The new group cannot be displayed in the published EChart Chart View.

If EChart security is enabled in OrgPublisher Enterprise, the published EChart reflects only the information accessible to the user, although field labels display in the dialog.

When using conditional formatting to create a position type group for Employees (record type E), the search results include both direct (E) and indirect employees (IE). If you need to separate the direct from indirect employees you can add additional logic to the Group Editor description of the group, such as:

OR PositionType = Employee

AND PositionType <> Indirect Report

*If you create a group based on a standard position type, such as Manager, then associate a custom position type to the group for conditional formatting, such as Top Performing Manager, the original position type is no longer a part of the group criteria. For instance, if you then searched for all "managers" the "top performing managers" will not be part of your search results because they are now a different position type. Your Boolean search should use both the original position type, Manager, and the new position type, Top Performing Manager, as a criteria using **And/Or**.*

Searching All Fields

You can conduct a search in this tab by using the **Search**, **For**, and **Match** field options. You can search any field including position type, custom field, or group, as well as any of the hidden or displayed fields in your chart, including hidden or displayed custom fields. You can also search the **All Fields** option using the Search View.

1. Open the *Search* dialog by selecting **Edit** from the Main menu then **Search** from the pull-down options, or open the **Search View** pane in the List View. You can also click on the Advanced Search button 

in the toolbar.

2. Select the **All Fields** tab in the *Search* dialog. If you are using the *Search View*, click the drop-down arrow in the first field and select **All Fields**.

3. If you have selected a specific box in the Chart View, the *Search* dialog selects the **Search under selected box** check box. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under selected box** check box to clear it.

   If you are using the *Search View* and want to start your search from a specific box in a chart, you must first select a box in the *Chart View* and then select the **Search under** check box. This begins the search at that point in the chart.

Note: *This feature begins the search at this level in the chart but does not confine the search to that single hierarchical tree.*

4. In the **Search** field, click the drop-down arrow to select what field you want to search. For instance, if you want to find a specific telephone number in order to identify an employee or department, you will scroll through the list until you reach the custom fields and the name for telephone number.

   You can also press the key of the first letter of the field you want to navigate through the list.

   Other examples include:

   – Search for open positions by selecting **Status type**.
   – Search for indirect reports by selecting **Relationship**.

5. In the **For** field, type the telephone number, or a portion of the number, you want to find.

   If, for instance, you chose **Status type** or **Relationship**, click the drop-down arrow and select a field option.

6. In the **Match** field, indicate with the drop-down arrow what you want to match.

Field	Description
= Any Part of Field	Select this option if you want OrgPublisher to find the records that contain fields with matching criteria in any part of the searched field.
= Match Whole Field	Select this option if you want OrgPublisher to find the records that contain fields exactly matching the criteria in the searched field.
= Start of Field	Select this option if you want OrgPublisher to find the records that contain fields with matching criteria at the beginning of the searched field.
<> Any Part of Field	Select this option if you want OrgPublisher to find the records that do not contain fields with matching criteria in any part of the searched field.
<> Match Whole Field	Select this option if you want OrgPublisher to find the records that do not contain fields with exactly matching criteria in the searched field.
<> Start of Field	Select this option if you want OrgPublisher to find the records that do not contain fields with matching criteria at the beginning of the searched field.
= Equal to	Select this option for date and numeric fields if you want OrgPublisher to find the records that contain exactly matching criteria in the searched field.
> Greater than	Select this option for date and numeric fields if you want OrgPublisher to find the records that contain dates or numbers that are greater than the criteria indicated in the searched field.
< Less than	Select this option for date and numeric fields if you want OrgPublisher to find the records that contain dates or numbers that are less than the criteria indicated in the searched field.
< > Not equal to	Select this option for date and numeric fields if you want OrgPublisher to find all the records that contain dates or numbers that do not match the criteria indicated in the searched field.
> = Greater than or equal to	Select this option for date and numeric fields if you want OrgPublisher to find the records that contain dates or numbers greater than or equal to the criteria indicated in the searched field.
< = Less than or equal to	Select this option for date and numeric fields if you want OrgPublisher to find the records that contain dates or numbers that are less than or equal to the criteria indicated in the searched field.
In group	Select this option if you want OrgPublisher to find only the records that are contained in the specified group.

Field	Description
Not in group	Select this option if you want OrgPublisher to find only the records that are not contained in the specified group.
Sounds Like	Select this option if you want OrgPublisher to find the records that closely match the typed name or word.

7. If you are using the *Search* dialog, select the **Match Case** check box if you want the search to match upper or lower case formats in your text.
8. If applicable, you can select a group to filter your search. Click the Search Base Group Filter button  . The *Search Base Group Filter* dialog opens.
9. Select the **Use a base group filter** check box.
10. Click the down-arrow to select the group you want to use as a filter.
11. Click **OK**. The dialog closes and the filter button appears to be "pressed in." This indicates that a base filter is set for your search.
12. Click **Search Now** in the *Search* dialog or **Go** in the Search View. If you chose a group filter, OrgPublisher searches only the selected group and displays the matching records. If no group filter was selected, the entire chart is searched and matching records shown.
13. If you are looking for a certain record, click on it. OrgPublisher moves to that section of the chart and highlights the record you have selected. If you are creating a new group, click **Save as group**.
14. Type the name you want to use in the *Enter a group name* dialog.
15. Click **OK** to save the group.

    You can also include search results in the side by side profile by clicking the Include the search results in Profile View button  . Side by side profiles are limited to 6 at a time if you auto-pin the profiles in the *Search View*.

Note: *All records in the Profile View, pinned or not, are included when you save profiles as a group.*

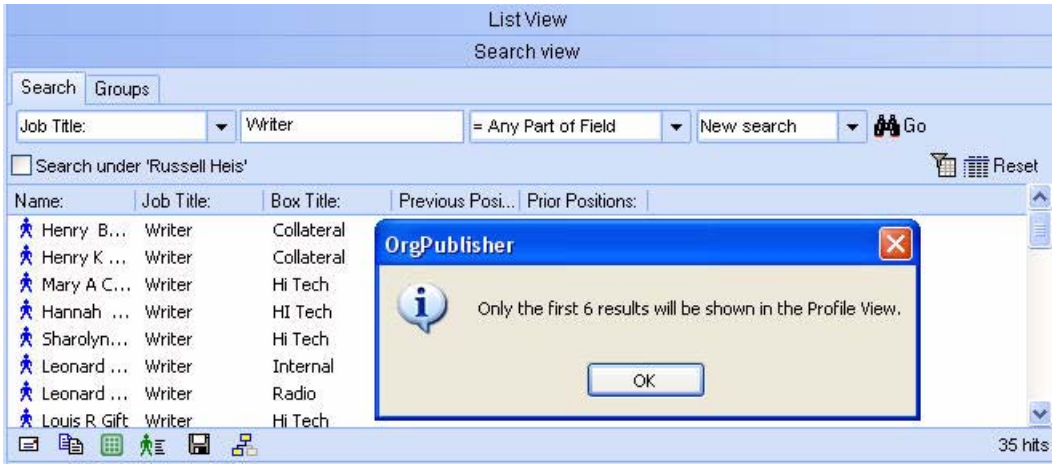


Figure 110

Note: *You can click on "auto-pin" as many times as you'd like to append the next six people into the Profile View along to existing profiles, or you can pin an unlimited number individually.*

Searching by Box Title

You can conduct a simple search in this tab by using the **Match** field options in the *Search* dialog or by using the *Search View*.

1. Open the *Search* dialog by selecting **Edit** from the Main menu then **Search** from the pull-down options, or open the **Search View** pane in the *List View*. You can also click on the Advanced Search button 

in the toolbar.

2. Select the **Box Title** tab in the *Search* dialog. If you are using the *Search View*, click the drop-down arrow and select the **Box Title** option.

3. If you have selected a specific box in the Chart View, the *Search* dialog selects the **Search under selected box** check box. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under** selected box check box to clear it.

   If you are using the Search View and want to start your search from a specific box in a chart, you must first select a box in the *Chart View* and then select the **Search under** check box. This begins the search at that point in the chart.

Note: *This feature begins the search at this level in the chart but does not confine the search to that single hierarchical tree.*

4. Type all or a portion of the box title in the **Box title** field.
5. In the **Match** field, indicate with the drop-down arrow what you want to match or do not want to match.

Field	Description
= Any Part of Field	Select this option if you want OrgPublisher to find the records that contain fields with matching criteria in any part of the searched field.
= Match Whole Field	Select this option if you want OrgPublisher to find the records that contain fields exactly matching the criteria in the searched field.
= Start of Field	Select this option if you want OrgPublisher to find the records that contain fields with matching criteria at the beginning of the searched field.
<> Any Part of Field	Select this option if you want OrgPublisher to find the records that do not contain fields with matching criteria in any part of the searched field.
<> Match Whole Field	Select this option if you want OrgPublisher to find the records that do not contain fields with exactly matching criteria in the searched field.
<> Start of Field	Select this option if you want OrgPublisher to find the records that do not contain fields with matching criteria at the beginning of the searched field.
In group	Select this option if you want OrgPublisher to find only the records that are contained in the specified group.
Not in group	Select this option if you want OrgPublisher to find only the records that are not contained in the specified group.
Sounds Like	Select this option if you want OrgPublisher to find the records that closely match the typed name or word.

6. If you are using the *Search* dialog, select the **Match Case** check box if you want the search to match upper or lower case formats in your text.
7. If applicable, you can select a group to filter your search. Click the Set or remove a base filter button  . The *Search Base Group Filter* dialog opens.
8. Select the **Use a base group filter** check box.

9. Click the down-arrow to select the group you want to use as a filter.
10. Click **OK**. The dialog closes and the filter button appears to be "pressed in." This indicates that a base filter is set for your search.
11. Click **Search Now** in the *Search* dialog or **Go** in the *Search View*. If you chose a group filter, OrgPublisher searches only the selected group and displays the matching records. If no group filter was selected, the entire chart is searched and matching records shown.
12. If you are looking for a certain record, click on it. OrgPublisher moves to that section of the chart and highlights the record you have selected. If you are creating a new group, click **Save as group**.
13. Type the name you want to use in the *Enter a group name* dialog.
14. Click **OK** to save the group.

    You can also include search results in the side by side profile by clicking the Include the search results in Profile View button  . Side by side profiles are limited to 6 at a time if you auto-pin the profiles in the Search View.

Note: *All records in the Profile View, pinned or not, are included when you save profiles as a group.*

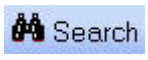
See Figure .

Note: *You can click on "auto-pin" as many times as you'd like to append the next six people into the Profile View along to existing profiles, or you can pin an unlimited number individually.*

Searching by Job Title

You can conduct a simple search in this tab by using the **Match** field options in the Search dialog or by using the *Search View*.

If you want to search for a specific job title in your chart:

1. Open the *Search* dialog by selecting **Edit** from the Main menu then **Search** from the pull-down options, or open the **Search View** pane in the *List View*. You can also click on the Advanced Search button 

in the toolbar.
2. Select the **Job Title** tab in the *Search* dialog. If you are using the *Search View*, click the drop-down arrow and select the **Job Title** option.

3. If you have selected a specific box in the Chart View, the *Search* dialog selects the **Search under selected box** check box. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under selected box** check box to clear it.

   If you are using the Search View and want to start your search from a specific box in the chart, you must first select the box in the *Chart View* and then select the **Search under** check box. This begins the search at that point in the chart.

Note: *This feature begins the search at this level in the chart but does not confine the search to that single hierarchical tree.*

4. Type all or a portion of the job title in the **Job Title** field.

5. In the **Match** field, indicate with the drop-down arrow what you want to match or do not want to match.

Field	Description
= Any Part of Field	Select this option if you want OrgPublisher to find the records that contain fields with matching criteria in any part of the searched field.
= Match Whole Field	Select this option if you want OrgPublisher to find the records that contain fields exactly matching the criteria in the searched field.
= Start of Field	Select this option if you want OrgPublisher to find the records that contain fields with matching criteria at the beginning of the searched field.
<> Any Part of Field	Select this option if you want OrgPublisher to find the records that do not contain fields with matching criteria in any part of the searched field.
<> Match Whole Field	Select this option if you want OrgPublisher to find the records that do not contain fields with exactly matching criteria in the searched field.
<> Start of Field	Select this option if you want OrgPublisher to find the records that do not contain fields with matching criteria at the beginning of the searched field.
In group	Select this option if you want OrgPublisher to find only the records that are contained in the specified group.
Not in group	Select this option if you want OrgPublisher to find only the records that are not contained in the specified group.
Sounds Like	Select this option if you want OrgPublisher to find the records that closely match the typed name or word.

6. If you are using the *Search* dialog, select the **Match Case** check box if you want the search to match upper or lower case formats in your text.

7. If applicable, you can select a group to filter your search. Click the Set or remove a base filter button  . The *Search Base Group Filter* dialog opens.

8. Select the **Use a base group filter** check box.

9. Click the down-arrow to select the group you want to use as a filter.

10. Click **OK**. The dialog closes and the filter button appears to be "pressed in." This indicates that a base filter is set for your search.

11. Click **Search Now** in the *Search* dialog or **Go** in the *Search View*. If you chose a group filter, OrgPublisher searches only the selected group and displays the matching records. If no group filter was selected, the entire chart is searched and matching records shown.

12. If you are looking for a certain record, click on it. OrgPublisher moves to that section of the chart and highlights the record you have selected. If you are creating a new group, click **Save as group**.

13. Type the name you want to use in the *Enter a group name* dialog.

14. Click **OK** to save the group.

    You can also include search results in the side by side profile by clicking the Include the search results in Profile View button  . Side by side profiles are limited to 6 at a time if you auto-pin the profiles in the Search View.

Note: *All records in the Profile View, pinned or not, are included when you save profiles as a group.*

See Figure .

Note: *You can click on "auto-pin" as many times as you'd like to append the next six people into the Profile View along to existing profiles, or you can pin an unlimited number individually.*

Searching by Name

You can conduct a simple search in this tab by using the **Match** field options in the *Search* dialog or by using the *Search View*.

If you want to search for an employee name in your chart:

1. Open the *Search* dialog by selecting **Edit** from the menu bar, then **Search** from the pull-down options or open the **Search View** pane in the List View. You can also click on the Advanced Search button  in the toolbar.

2. Select the **Name** tab in the *Search* dialog. If you are using the Search View, click the drop-down arrow and select the **Name** option.

3. If you have selected a specific box in the *Chart View*, the *Search* dialog selects the **Search under selected box** check box. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under selected box** check box to clear it.

   If you are using the *Search View* and want to start your search from a specific box in the chart, you must first select the box in the *Chart View* and then select the **Search under** check box. This begins the search at that point in the chart.

Note: *This feature begins the search at this level in the chart but does not confine the search to that single hierarchical tree.*

4. Type all or a portion of the employee's last name in the **Last name** field.

5. Type all or a portion of the employee's first name in the **First name** field, if you have that information.

6. If you are using the *Search* dialog, type all or a portion of the employee's middle name in the **Middle name** field, if you have that information.

7. In the **Match** field, indicate with the drop-down arrow what you want to match.

Note: *If you type a last name and a first name, OrgPublisher searches for both names, and will not show a match if only one of the names is found.*

You can look for records that match (**=**) what you type, or do not match (**< >**) what you type.

Field	Description
= Any Part of Field	Select this option if you want OrgPublisher to find the records that contain fields with matching criteria in any part of the searched field.
= Match Whole Field	Select this option if you want OrgPublisher to find the records that contain fields exactly matching the criteria in the searched field.
= Start of Field	Select this option if you want OrgPublisher to find the records that contain fields with matching criteria at the beginning of the searched field.
<> Any Part of Field	Select this option if you want OrgPublisher to find the records that do not contain fields with matching criteria in any part of the searched field.
<> Match Whole Field	Select this option if you want OrgPublisher to find the records that do not contain fields with exactly matching criteria in the searched field.
<> Start of Field	Select this option if you want OrgPublisher to find the records that do not contain fields with matching criteria at the beginning of the searched field.
In group	Select this option if you want OrgPublisher to find only the records that are contained in the specified group.
Not in group	Select this option if you want OrgPublisher to find only the records that are not contained in the specified group.
Sounds Like	Select this option if you want OrgPublisher to find the records that closely match the typed name or word.

8. If you are using the Search dialog, select the **Match Case** check box if you want the search to match upper or lower case formats in your text.

9. If applicable, you can select a group to filter your search. Click the Set or remove a base filter button  . The *Search Base Group Filter* dialog opens.

10. Select the **Use a base group filter** check box.

11. Click the down-arrow to select the group you want to use as a filter.

12. Click **OK**. The dialog closes and the filter button appears to be "pressed in." This indicates that a base filter is set for your search.

13. Click **Search Now** in the *Search* dialog or **Go** in the *Search View*. If you chose a group filter, OrgPublisher searches only the selected

group and displays the matching records. If no group filter was selected, the entire chart is searched and matching records shown.

14. If you are looking for a certain record, click on it. OrgPublisher moves to that section of the chart and highlights the record you have selected. If you are creating a new group, click **Save as group**.

15. Type the name you want to use in the *Enter a group name* dialog.

16. Click **OK** to save the group.

17. You can also include search results in the side by side profile by clicking the Include the search results in Profile View button  . Side by side profiles are limited to 6 at a time if you auto-pin the profiles in the Search View.

Note: *All records in the Profile View, pinned or not, are included when you save profiles as a group.*

See Figure .

Note: *You can click on "auto-pin" as many times as you'd like to append the next six people into the Profile View along to existing profiles, or you can pin an unlimited number individually.*

Using the Sounds Like Feature

The OrgPublisher search option has been enhanced to allow you to search any text type fields based on a "sounds like" feature. This feature provides you with an increased chance of a successful search for people and information.

The view and dialogs affected by the new match field option **Sounds Like** are:

- **Group Editor**: Access this feature by right-clicking in a group icon in the **Groups** tab, then the **Compare** column.
- **Search View**: Access this feature by clicking on the down-arrow in the **Match** field.
- **Search dialog**: Access this feature by clicking on the down-arrow in the Match field in the **Name**, **Job Title**, **Box Title**, and **All Fields** tabs.

Search for information in the Search View or Search dialog using the Sounds Like feature:

1. Open the Search View or *Search* dialog.
2. Select the **Name** field (or other text field) in the *Search View*, or the **Name** tab (or one of the other tabs) in the *Search* dialog.
3. Type the name as accurately as possible in the **Last** field.
4. Click on the down-arrow in the **Match** field and select **Sounds Like**.
5. Click **Go**. The search results pane displays all names that come close to the spelling you used.

   This feature works with all text fields, such as **Job Title** or **Box Title**, and any text type in the **All Fields** tab.

Search for information in the Group Editor dialog using the Sounds Like feature:

1. Open the *Group Editor* dialog.
2. Click **Add** to set a new group criteria. A duplicate of the last criteria record is created.
3. Click on the **Compare** field and select **Sounds Like**.
4. Click in the **Value** field and type the name or word as accurately as possible.
5. Click **Search Now**. The search results pane displays all names or words that come close to the spelling you used.

Using the Group Filter in Searches

With OrgPublisher you can choose to filter your searches through a specific group. The filter button is included in the *Search View* and the *Search* dialog.

Note: *When you select a base group filter, you also limit the records displayed in the published directory view of the chart.*

1. Open the *Search View* or *Search* dialog and select the search criteria you want to use. Detailed instructions on how to conduct searches is available in the Searching All Fields, Searching by Box Title, Searching by Job Title, and Searching by Name procedures in this document.

2. Click the Set or remove a base filter for searching button  . The *Search Base Group Filter* dialog opens.
3. Select the **Use a base group filter** check box.
4. Click the down-arrow to select the group you want to use as a filter.
5. Click **OK**. The dialog closes and the filter button appears to be "pressed in." This indicates that a base filter is set for your search.
6. Continue selecting your search criteria and click **Search Now**. OrgPublisher searches only the selected group and displays the matching records.
7. Click the filter button again to remove the filter, or click it twice to reopen the *Search Base Group Filter* dialog to select a new group filter.

Adding to a Search Result List

You can combine two or more search results in order to create the unique group that you want.

1. In the *Search* dialog, select a tab to begin your search, such as **Name** or **Job Title**. Or, if you have an existing group that you want to search, click the Groups button  in the toolbar to open the *Group Editor* dialog.
2. If you have selected a specific box in the Chart View, the *Search* dialog selects the **Search under selected box** radio button. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under** selected box radio button to clear it.

Note: *This feature begins the search at this level in the chart but does not confine the search to that single hierarchical tree.*

3. Enter your search criteria and indicate if you want to **Match** part or all of the field, or **Match Case**. If you are searching the **All Fields** tab, select the **Search** field and enter or select the **For** field data, as well.
4. Click **Search Now**. The results display in the list in the lower section of the dialog.

5. If the results are what you want, click the **Add to list below** radio button to begin the second search.

6. Repeat Steps 2-5 until you have the **Group** you want. Then click **Save as Group**.

Combining Searches

You can combine two or more searches in order to create the unique group that you want.

1. Select a tab in the *Search* dialog or a field in the drop-down list of the Search View to begin your search. Or, if you have an existing group that you want to search, click the Groups button  in the toolbar to open the Group Editor dialog.

2. If you have selected a specific box in the Chart View, the *Search* dialog selects the **Search under selected box** radio button. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under selected box** radio button to clear it.

3. Enter your search criteria and indicate if you want to **Match** part or all of the field, or **Match Case**. If you are searching the **All Fields** tab, select the **Search** field and enter or select the **For** field data, as well.

4. Click **Search Now**. The results display in the list in the lower section of the dialog.

5. If the results are what you want, click the **Add to list below** radio button.

6. Repeat Steps 2-4 until you have the group you want. Then click **Save as Group**.

Conducting a Boolean Search

OrgPublisher's advanced search function enhances the *Search* dialog and *Search View* capabilities. You can take one of two approaches to a boolean search. You can search within a group list using boolean criteria or add additional records to your original list. Advanced users can go directly to the *Group Editor* dialog and add Boolean logic, that is, true/false logic to the group search criteria.

For example, you can search your chart for all employees hired before January 1, 2001 by first selecting **Position type** in the **Search** field, choosing **Employee** in the **For** field and selecting **=Equal** to in the **Match** field. Click **Search Now**.

The matching records for the first part of your search display. Then click the **Search within list below** radio button and enter the second part of your search criteria. Select Hire Date in the **Search** field, 01/01/2001 in the **For** field, and **< Less than** in the **Match** field. Click **Search Now**. Only the records matching both criteria are displayed in the results list. Now you can click **Save as Group** and you have your employees hired before 01/01/2001.

Your search criteria are saved as part of the group information so that you can use the same criteria later.

The components of a Boolean search include:

All Fields tab

Component	Description
Search	This field displays all standard and custom fields within your chart in a drop-down list. Select the field you want to search. Sample value: **Position type** or **Status type**
For	This field varies based on the selection made in the **Search** field. Type what you want to search for or select from the options list. Sample value: Type text or select either **Contractor** or **Filled Position**.
Match	Information in the drop-down list in this field varies based on the selection made in the **For** field. Select the value you want to use for your search. Sample value: Select **= Equal to**, **> Greater than**, or **< Less than**
Match Case	This check box is available based on the selection made in the **For** field. Displays **Yes** or **No**, depending on your search criteria. When adding new search criteria, select the check box to match upper and lower case text.
Search Now	Click this button to perform the search and display all the matching records in the lower pane of the dialog. When adding new search criteria, click this button to begin your search.

Component	Description
Close	Click this button at any time to close the dialog.
Search under selected box	Check box is selected if you have clicked on a specific box in your chart that is not the "top of chart." When adding new search criteria, select this radio button if you want to begin your search at a selected point in the chart. You must select a box in the Chart View to enable this feature.
New Search	Select this radio button if you want to discard current records displayed and begin a new search.
Add to list below	Click this radio button if you want to keep the existing displayed records and you want to add the results of your new search to the current list. This is an "OR" condition.
Search within list below	Click this radio button if you want to search only the records already displayed in a search. This is an "AND" condition.
Number of people found	Display in the lower left-hand corner indicates the number of matching records found in your search.
Copy List to Clipboard	Click this button if you want to copy the list of matching records in order to paste them into another Microsoft® Windows® application.
Save as group	Click this button if you want to save the search criteria group.

Group Editor dialog

Component	Description
Group Name	Field displays the name of the group you have selected. You can type a new name.
Add	Click this button to add a new Boolean search criterion for the group definition and to copy the previous or selected criterion, if available.
Remove	Click this button to delete the selected Boolean search criterion.
Move Up	Click this button to move the selected criteria up one record in the dialog, modifying the search priority.
Move Down	Click this button to move the selected criteria down one record in the dialog, modifying the search priority.
And/Or	Select **AND** if you want your search results to meet both (or all) lines of criteria. Select **OR** if you want your search results to meet either (or some) line of criteria.

Component	Description
Search Field	Displays the field or fields in the chart your search is based on. When adding new search criteria, select a field you want to find from the drop-down options list. Sample value: **Head count** or **Planned Head count**.
Compare	This field varies based on the selection in the **Search Field** column. Displays the value or action performed in your search. When adding new search criteria, select a value or action from the options list. Sample value: Select **=Equal to**, **> Greater than**, **< Less than**, **<> Not equal to**, **>= Greater than or equal to**, **<= Less than or equal to**, or **Sounds Like**.
Value	This field varies based on the selection in the **Search Field** column. Displays the information you looked for in your search. When adding new search criteria, type what you want to find or select a value from the drop-down options list. Sample value: date (**99/06/03**) or number (**12**)
Match Case	This check box is available based on the selection made in the **For** field. Displays **Yes** or **No**, depending on your search criteria. When adding new search criteria, select the check box to match upper and lower case text.
Image to show in chart for people in this group	This field displays the icon shown in the chart for the selected group. Select an icon from the drop-down options list if you want to display a group icon in the chart.
Just selection	Check box is selected if you have clicked on a specific box in your chart that is not the “top of chart .” When adding new search criteria, select this radio button if you want to begin your search at a selected point in the chart. You must select a box in the Chart View to enable this feature.
Search Now	Click this button to perform the search and display all the matching records in the lower pane of the dialog. When adding new search criteria, click this button to begin your search.
Save	Click this button to save the displayed records and group search criteria.
Save As	Click this button to save the displayed results under a new group name.
Cancel	Click this button to cancel your search.

Component	Description
Matching reocrds display	The lower pane in this dialog displays the existing group records or the matching records of your new search.
People found	Display in the lower left-hand corner indicates the number of matching records found in your search.

Searching within the Group Results List

After you have done a search and a list displays in the *Search* dialog or Search View pane in the List View, you can also search within that list. This enables you to eliminate records and narrow your search criteria.

1. Click the **Search within list below** radio button.
2. If you have selected a specific box in the Chart View, the *Search* dialog selects the **Search under selected box** check box. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under selected box** check box to clear it.

Note: *This feature begins the search at this level in the chart but does not confine the search to that single hierarchical tree.*

3. Choose the search tab and enter your search criteria and indicate if you want to **Match part or all of the field**, or **Match Case**. If you are using the **All Fields** tab, select the **Search** field and enter or select the **For** field data, as well.
4. Click **Search Now**. The new results display in the list in the lower section of the dialog.

   You can also include search results in the side by side profile by clicking the Include the search results in Profile View button  . Side by side profiles are limited to 6 at a time if you auto-pin the profiles in the *Search View*.

Note: *All records in the Profile View, pinned or not, are included when you save profiles as a group.*

You can click on "auto-pin" as many times as you'd like to append the next six people into the Profile View along to existing profiles, or you can pin an unlimited number individually.

Spotlighting Search Results in the Chart View

You can use the chart spotlighting feature to highlight search results in the Chart View, or dim boxes that are not part of the search result, you can use the Spotlight search results in chart button  in the Search View. You can use this feature alone, or in conjunction with the spotlight group boxes feature.

Note: *The Spotlighting feature works only in View Mode.*

1. Open the *Search View*.
2. Select the search criteria and click **Go** to begin the search.
3. When the search results display in the *Search View*, click the Spotlight search results in chart button  . The boxes in the *Chart View* that are not part of the search results are dimmed.
4. Click the button again to disable the spotlight search results feature.

Note: *When printing a chart with the spotlighting feature enabled, if your printer does not support AlphaBlend, your printed chart will show all boxes as in the past. See your IT administrator if you have any questions.*

Viewing Search Results in Microsoft Excel

You can open and view your search results list directly in Microsoft® Excel. All information you can see in the results list in OrgPublisher is copied into Microsoft Excel.

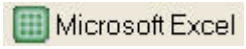
View Search View Results in Microsoft Excel

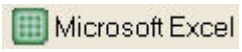
1. Open the *List View*  in the chart.
2. Select the **Search View** pane.
3. Conduct the search you want, or sort the records as required. Click the Open in Microsoft Excel button  at the bottom of the view. Microsoft Excel opens with your chart records list.
4. You can also open the **Groups** tab in the *Search View*, select a group, and click the Excel button  to open the group list in Microsoft Excel.

View Search Dialog Results in Microsoft Excel

You can also open your search results in the *Search* dialog in Microsoft Excel.

1. Open the *Search* dialog by clicking the Advanced Search button 

in the toolbar or by selecting **Edit** from the Main menu and **Search** from the options list. The *Search* dialog opens at the **Name** tab.
2. Conduct the search you want then click the Open search results in Microsoft Excel button 

. Microsoft Excel opens with your search results list.
3. You can also open the **Groups** tab in the *Search* dialog, select a group, and click the Open search results in Microsoft Excel button 

to open the group list in Microsoft Excel.

Using the Groups tab in the Search dialog

You can search existing groups, add or delete a group, edit an existing group, or change the group display window from large to small icons or to a group name list. You can do all this in the **Groups** tab.

When working with a published EChart, you can search existing groups and create new groups. You cannot edit an existing group. The new group, however, cannot be displayed in the published EChart Chart View.

1. Open the *Search* dialog by selecting **Edit** from the Main menu then **Search** from the pull-down menu. You can also click on the Advanced button 

in the toolbar.
2. Select the **Groups** tab. To create a new group, click on the New button 
. The *Group Editor* dialog opens. See the Using the Group Editor Dialog procedure for detailed information.
3. Click the Export Groups button 
if you want to export a group to be used by other users or on a different PC.
4. Click the Import Groups button 
if you want to import a group.

5. To search or modify an existing group in the *Group Editor* dialog, click on the group icon or name and click **Search Now**. The group list displays in the lower frame of the dialog.

Note: *You can also use the base group filter option to narrow your search.*

6. Select the tab you want to use for your search, **Name**, **Job Title**, **Box Title**, **All Fields**.
7. To delete an existing group, click the Delete Group Definition button  . The group is immediately deleted from the existing groups.
8. To modify the existing group, click the Edit Group Definition button  to open the *Group Editor* dialog.
9. You can change how you display your group names by clicking on one of the display buttons, such as, View large icons  , View Small Icons  , or View Details  .
10. You can copy the existing group list by clicking **Copy List to Clipboard**, then opening the other application and pasting the list into the document.
11. You can modify a group name by clicking **Save as Group** and typing the new name in the *Enter a group name* dialog.

Note: *If you choose not to secure ECharts, they can be accessed by any chart user, as well as any user who can access the server where the EChart resides.*

If you plan to use EChart security, verify that your custom fields are set for ***Security*** *before you open the Publishing Wizard.*

Using the My groups tab in the Search View

Not only can you search for information in a published chart, end users can also save the search results as a group. Groups saved by end users are displayed in the **My groups** tab of the Search View in the published chart. The **My groups** tab is enabled only in the published chart.

When working with a published EChart, you can add new groups, but the existing groups cannot be modified or deleted. The new group cannot be displayed in the published EChart Chart View.

1. Open a published chart in your browser. The **Everyone** group, the OrgPublisher default, automatically opens at the **My groups** tab.

2. Open the List View and select the **Search View** pane. Three tabs are shown, **Search**, **Groups**, and **My groups**. The **Search** tab enables you to search for specific information in the chart. You can copy the results list or save the list as a group. The **Groups** tab displays the groups created by the OrgPublisher administrator before publishing the chart. The **My groups** tab displays all groups saved by the end user plus the default **Everyone** group.

3. If you haven't already done so, conduct your search using the **Search View** pane.

Note: *You can use the base group filter option to narrow your search.*

4. When your search result is the way you want it, click **Save as Group**. The *Enter a group name* dialog opens.

5. Type the name of the group and click **OK**. The **My groups** tab opens and displays the new group name. Also available are three buttons.

   The New Group Definition button  opens the *Group Editor* dialog to add a new group definition. The Delete Group Definition button  deletes a selected group, and the Edit Group Definition button  opens the *Group Editor* dialog to edit an existing group definition.

Note: *If the end user must change PCs, the export and import buttons enable the transfer of end user groups from one machine to another. See the Exporting and Importing Groups procedure in this document.*

6. To display a specific group in the published chart, open the Groups View by clicking on the groups label in the OrgPublisher Style bar.

CHAPTER 6

CREATE AND WORK WITH GROUPS

Note: *Although this section provides information on manually editing a chart, remember that if you want the changes to remain permanent, you must apply the changes to your HR database. When your HR data is refreshed and you open your chart, your manual changes are overwritten.*

Published real-time charts provide single field searching capabilities; complex or group searching and saving My groups are not available.

If you plan to create a large number of groups, for instance 60 - 70, it is recommended that you use more than one chart.

By default, OrgPublisher is set to display the top of chart box if no results are found for a search. If you conduct a search that results in a blank Chart View, verify that the group option default is set. Select Options from the Main menu, Group display options, and then Auto adjust display to show group.

If you create a group based on a standard position type, such as Manager, then associate a custom position type to the group for conditional formatting, such as Top Performing Manager, the original position type is no longer a part of the group criteria. For instance, if you then searched for all "managers" the "top performing managers" will not be part of your search results because they are now a different position type. Your Boolean search should use both the original position type, Manager, and the new position type, Top Performing Manager, as a criteria using And/Or.

If there is more than one group-based position type for which a person qualifies, the first match is used in Search and Summary tasks.

When using conditional formatting to create a position type group for Employees (record type E), the search results include both direct (E) and indirect employees (IE). If you need to separate the direct from indirect employees you can add additional logic to the Group Editor description of the group, such as:

OR PositionType = Employee

AND PositionType <> Indirect Report

Defining Groups

You can search your org chart for position types or custom field information and then create special groups within your chart. In addition, you can create unique styles using the group charts or copy the group data and paste it into a spreadsheet for further analysis. You can even create summaries with just the group information.

Groups can be used to manage role-based security, summarize numeric data for group members, or quickly send an e-mail message to group members from the published chart.

You can also create groups in OrgPublisher Premier by Creating a Side-by-Side Profile View.

With the Search feature, you can create and chart groups by:

Position Type - for instance, director, manager, staff position (Searching All Fields)

Name - for instance, a complete name, John Smith, by first name , John, or by last name , Smith (Searching by Name)

Job Title - for instance, Sales Rep, Technical Support (Searching by Job Title)

Box title - for instance, department (Searching by Box Title)

Custom Field - for instance, hire date, salary, office location, male or female (Searching All Fields)

Any combination of fields or text - for instance, female managers hired after a certain date (Conducting a Boolean Search)

Any word or number in a field - for instance, marketing (Searching All Fields)

Conduct searches for records that **exclude specific data** (Conducting a Boolean Search)

You can further define your group in your org chart by selecting a group icon to display next to the name of each person in the chart belonging to that group.

Note: *You can also define a conditional position type to which you assign a group for formatting purposes. Conditional formatting is meant to increase the visibility*

of distinct groups in your chart based on a single attribute, such as "High Performers."

Saving and Charting Search Results as a Group

When you create a group, it can be used in any style at any time. A style can be saved to open with a particular group displayed. OrgPublisher automatically creates the **Everyone** group, which is the default group displayed when you open your chart. You can modify a group from any style and all styles reflect those changes. Search criteria can be reused as chart data is refreshed.

Show/Hide functions affect charting groups, thus only the position types allowed by the style will display in the group chart. Group charts are always displayed in the View Mode.

The Style Bar displays the name of the group currently shown in your chart on the right side of the bar, and you can click on the down-arrow to open the Groups View.

The chart is a visual representation of the group members within the original hierarchy, showing the matching records and the boxes they report to.

Saving a Group

1. Conduct your search using one of the *Search* dialog tabs or by using the **Search View** pane in the List View.
2. When your search result is the way you want it, click **Save as Group**. The *Enter a group name* dialog opens.
3. Type the name of the group.
4. Click **OK**. The *Search* dialog or Search View displays the **Group** tab with the new group shown. If an end user has conducted a search in the published chart, the saved group displays in the **My groups** tab of the *Search View*.
5. If you are using the *Search* dialog, close it. Click on the down-arrow in the Styles bar. A Groups View displays your group names.
6. Click on the name of the group you want to chart. The Chart View displays the group members within the original hierarchy.

For instance, if you searched your chart to find all open positions and saved the group, the charted group shows the boxes containing open positions and the parent boxes those open positions report to.

Side by side profiles are limited to 6 at a time if you auto-pin the profiles in the *Search View*.

Note: *All records in the Profile View, pinned or not, are included when you save profiles as a group.*

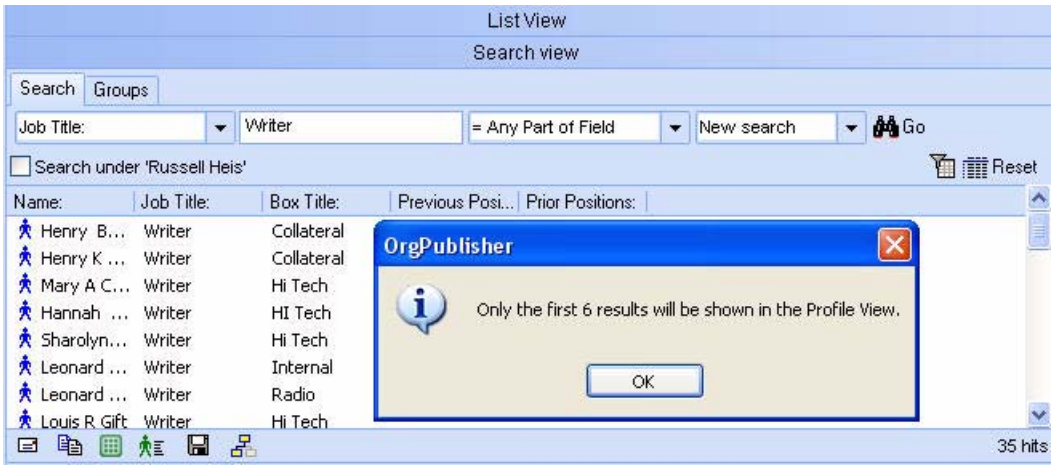


Figure 111

Adding a New Group

You can add a person to a group directly from the Chart View. In addition, you can add a new group using the *Select a Group* text box .

Note: *Adding a new group is not necessarily the same as adding a group to a conditional position type. Use conditional formatting only to distinguish a single attribute group in your chart.*

Adding a Group by Searching

1. Conduct your search using one of the *Search* dialog tabs or by using the **Search View** pane in the List View.
2. When your search result is the way you want it, click **Save as Group**. The *Enter a group name* text box opens.
3. Type the name of the group.

4. Click **OK**. The *Search* dialog or Search View displays the **Groups** tab with the new group displayed.

Note: *It is best not to give groups the same names as custom items. Custom legend items and groups that have the same name do not synch.*

If an end user has conducted a search in the published chart, the saved group displays in the My groups tab of the Search View. The new group displays in the PluginX Group View only.

5. If you are using the *Search* dialog, close it. Click on the down-arrow in the Style Bar. The Groups View displays your group names. Click on the name of the group you want to chart. The Chart View displays the group members within the original hierarchy.

   For instance, if you searched your chart to find all open positions and saved the group, the charted group shows the boxes containing open positions and the parent boxes those open positions report to.

Adding a Group using right-click menu

1. In the *Chart View*, select the name of the person you want to add to a new group.
2. Right-click on the person's name. The *Select a Group* text box opens.
3. Click **New Group**. The *Enter a group name* text box opens.
4. Type the name for the group. Click **OK**. The text box closes. The new group is created and the name is added to the *Groups View*.

Adding a Group Icon

You can add an image to display in your chart next to the names of individuals belonging to a selected group. You can use standard 16x16 and 32x32 pixel icons (.ico files).

Note: *Conditional formatting does not perform the same function in the org chart as the display of group icons. In particular, if you want to show that an employee is a member of more than one group, use the group icon feature.*

Using group and multi-reporting relationship icons in conjunction with Conditional Formatting is not recommended. These two features distinguish different aspects of group information and are not meant to work together.

1. Click the Search  button in the toolbar. The *Search* dialog opens.

2. Click the **Groups** tab and double-click on the group you want to modify. The *Group Editor* dialog opens.
3. Select the radio button to choose from **Small icons** or **Large icons**.
4. Click the down-arrow in the **Displayed image for people in this group** field and select the icon you want to display from the pull-down list.

   You can also scroll to the end of the list and click **Other**. This opens the *Select an icon file* dialog where you can browse to another icon image resource file. Valid files of type are *.ico, *.dll, *.exe, *.ocx.
5. If applicable, you can select the check box to **Hide this group in published chart**. For additional information, see the Hiding Groups in Published Charts procedure in this document.
6. Click **Save**. The dialog closes.
7. Click **Close** to return to the Chart View.
8. The selected group icon displays in the lower-left corner of the group member's box. You can change where you want to display the icon by selecting **Format** from the menu and **Boxes** from the options list. In the **Show group icons** field, select **Left**, **Center**, or **Right**.
9. You can click on the group icon to open the *Group Editor* dialog to modify or delete (select **(None)** from the pull-down list) the displayed icon.

Adding a Person to a Group

You can add a person to a group directly from the *Chart View* by using the right-click menu **Add person to group**.

Note: *This "Search" and addition to a group uses the information in Field 5. This information becomes part of the group criteria and is displayed and searchable. Do not store sensitive information in this field.*

1. In the *Chart View*, select the name of the person you want to add to an existing group.
2. Right-click on the person's name and select the **Add person to the Group** option. The *Select a Group* dialog opens.
3. Click the down-arrow and select a group from the drop-down list and click **OK**.
4. The text box closes and the person is now included in the selected group.

Copying a Group List

Just as you can copy the List View and Summary View into another Microsoft® Windows® application, you can also copy the group list.

Note: *Because of its size, the Copy whole list feature in the List View for a published EChart is disabled. You can use this group copy and paste feature to print the entire records list of an EChart as a substitute for that option. Simply open the Everyone group and follow this procedure.*

1. Conduct your search in the *Search* dialog or Search View. The list of matching records displays in the lower pane. Or, if you have an existing group that you want to search, click the groups button in the toolbar to open the *Group Editor* dialog.

   You can also click on a group name in the **Groups** tab (click **Search Now** in the *Search* dialog) to display the group.

2. If you are using the *Search* dialog, click **Copy List to Clipboard**. In the *Search View* click **Copy list**.

3. Open the application in which you want to place the list and paste it. The records in the group list are pasted into the new document.

Creating a Group Head Count

You can use the summary feature to generate a group head count.

1. Open the Head Count Wizard by selecting **Tools** in the Main menu, then **Head count Wizard** from the options list. You can also click the Head count Wizard  button in the Wizard View. Click **Next**.

2. Click the drop-down arrow in the **Population** field and select the group name for which you want to create the head count. Click **Next**.

Note: *Orphan records and broken hierarchies can adversely affect summary and security functions. Unexpected results can occur that may cause head count or other totals to be incorrect.*

3. Type the head count **Label**. If you want to hide the field label in your chart, select the **Hide label** check box. Click **Next**.

4. Select the **Position type** to display the head count. Click **Next**.

5. Click **Finish**. The new group head count displays in the selected position type.

Note: *In conditional formatting, the search feature and all calculations follow the conditional position type. Formatting follows the group. If you display the Summary View in a chart with conditional formatting, you should hide either the group or position type of the conditional format. If you don't, head counts display in both areas.*

If there is more than one group-based position type for which a person qualifies, the first match is used in Search and Summary tasks.

Deleting a Group

You can delete a group definition through the *Search* dialog or Search View.

1. Open the *Search* dialog by selecting **Edit** from the Main menu, then **Search** from the pull-down menu. You can also click on the Search button  in the toolbar. In addition, you can open the *List View* and select the **Search View** pane.
2. Select the **My groups** or **Groups** tab.
3. Click the group then click the Delete Group Definition button  . The group is immediately deleted from the existing groups .

Editing a Group Definition

1. Click the Search button  in the toolbar. The *Search* dialog opens.
2. Select the **Groups** tab.
3. To modify an existing group, double-click on that group to open the *Group Editor* dialog. Click **Search Now** to display the group list. You can also open the **Search View** pane in the *List View* and select the **Groups** tab. Click the Edit Group Definition  button to open the *Group Editor* dialog.
4. To add search criteria, click **Add** to copy the last criteria line, then modify it by using the **And/Or**, **Search Field**, **Compare**, **Value**, and **Match Case** fields. Click on the values in those fields and select the option you want to use from the drop-down list.

5. When you have added all the search criteria, click **Search Now** to conduct the search. If you are modifying an existing group, the results are added to that list. If you are creating a new group the results display in the lower pane.

6. To delete an existing group criterion, highlight the record and click the Remove button 

.

7. Save the changes to an existing group by clicking **Save**. Save to a new group by clicking **Save As**.

8. You can continue to build criteria for additional groups or click **Cancel** to close the *Group Editor* dialog and return to the Search dialog or Search View.

Note: *If you delete the custom position type, the records will return to the original position type assigned.*

Do not mix groups based on position type with position types based on groups.

Exporting and Importing Groups

OrgPublisher includes export and import options for both the OrgPublisher application and the PluginX chart. End users no longer have to lose their group information when they have to change PCs. You, as the administrator can now share groups with other administrators.

If duplicate group names are imported, OrgPublisher will append the name with a number, 1, 2, 3, etcetera. No groups are overwritten by the import process.

When exporting groups that reference other groups, verify that they reference the correct group. If a referenced group is not included in the import, the affected group will not be imported and an error message displays.

Note: *In order to import a group successfully, the number, type, and order of custom fields in the chart receiving the import must match exactly the number, type, and order of custom fields in the chart from which the group was exported.*

The "Everyone" group cannot be exported or imported.

Export groups:

1. Open the Search View or the *Search* dialog. Click on the **My groups** tab if you're in a published chart or the **Groups** tab if you're in the application. The group names display in the upper pane.
2. Click the Export groups button  . The *Select Groups to Export* dialog opens.
3. Click **Select all** if you want to export all of the groups. You can clear groups you do not want to export, or you can click **Clear all** if there are many groups and you want to select just a few.
4. Type or **Browse** to the file into which you want to export your groups, such as a file in your network drive. Type a name for the group files and click **Open**. The file extension is **OCG**, **Group Data Files**.
5. Click **Export** to send the groups to the selected file. A message displays to let you know if your groups were successfully exported.

Import groups:

1. Open the *Search View* or *Search* dialog. Click on the **My groups** tab if you're in a published chart or the **Groups** tab if you're in the application.
2. Click the Import groups button  . The *Select Groups to Import* dialog opens.
3. Type or **Browse** to the file from which you want to import your groups. The names of the groups in the selected file display.
4. Click **Select all** to import all of the displayed groups to your PC. You can clear the groups you do not want to import or click **Clear all** if there are many groups and you want to select just a few.
5. Click **Import**. A message displays that your groups have been successfully imported. The selected groups display in the PluginX (published chart) **My groups** tab.

Hiding Groups in Published Charts

With OrgPublisher you can hide selected groups in published charts.

Note: *You can select a group to hide in the OrgPlan chart; however, there is no "undo" for this feature. If you save the chart with the group hidden, you*

cannot access the hidden group. You must conduct a new search using the same criteria if you want to recover the group.

1. Click the Search button  in the Navigation toolbar. The *Search* dialog opens.
2. Click the **Groups** tab to display groups available in the current chart.
3. Double-click on the group you want to hide. The *Group Editor* dialog opens.
4. Select the **Hide this group in published chart** check box.

Note: *Hidden groups are removed from the Groups View and Chart View in both the application and the published chart. In addition, hidden groups cannot be seen in the Search View, Search dialog, Groups View, or Chart View in the published chart. They can be seen in the application in the Groups tab of the Search View and Search dialog.*

5. Click **Save** then **Close** the *Search* dialog.
6. Complete the publishing steps. When you open the published chart the selected group will not display in the chart or the Groups View.

Note: *Keep in mind when you choose to show or hide fields that all information you can view in the OrgPublisher chart or search results list is also displayed when you copy the chart to Microsoft PowerPoint or the search results to Microsoft Excel.*

Opening a Selected Group in the Chart View

Your chart may contain several groups. OrgPublisher displays only one group at a time, but you can quickly select and open another.

1. Click on the group label in the Style Bar. The *Groups View* opens.
2. Click on the group you want to view. The *Groups View* closes, and your selected group hierarchy displays in the Chart View.

You can also use the group spotlighting feature, accessed by right-clicking on the group name in the Style bar, and selecting **Group filter in chart** then **Spotlight boxes in group**.

Removing a Person from a Group

You can remove, or delete a person from a group by using the right-click menu in the *Search View*.

1. Open the *List View* and select the **Search View** pane.
2. Click the **Groups** tab then click on the group you want to modify. The group members display in the lower pane.
3. Right-click on the name of the person you want to delete from the group. The right-click menu opens.
4. Select Remove person from group. The name is removed from the group.

There is no "Undo" option for this process. If you remove a person in error, you can locate them in the chart and add them back into the group.

Securing Styles to a Group

With OrgPublisher styles may be secured to groups in published ECharts, which can enhance a secure rich client EChart. In securing styles to groups, you must remember that each chart viewer must have access to at least one style.

Note: *Deleting a group associated with a style security makes that style available to every EChart user.*

EChart security works only with an unbroken hierarchy. Orphans within a secured chart will disrupt all security controls.

1. Select **File** from the Main menu then **Styles** from the options list. The *Styles* dialog opens.
2. Select the style you want to secure by clicking on it in the top pane of the dialog.
3. In the lower pane, use the down-arrow to select the group to which you want to secure the style. You may also create a new style to secure to a group.
4. Click **Close**. The Chart View displays your group and style.
5. Follow the EChart publishing procedure to publish your chart.

Sending Email to a Group

If enabled by your Administrator, an email button displays in the Search View, and you can send an email to a group. When a custom field type, **Email**, is used within a chart, the email to group feature is enabled in the *Search View*.

Note: *When working with published chart in PDF format, end users must use Adobe® Reader® 9 to effectively open email links. OrgPublisher will install this free reader if it cannot find it on the end user's operating system.*

If the custom field type Email is not used, the Email to group button does not appear in the Search View.

Note: *OrgPublisher looks for the first custom field of Email type when sending email to a group. If you decide to use more than one email address in your chart, the primary email must be first in the custom field sequence order.*

1. Open the **Search View** pane of the List View.
2. Click the **Groups** tab and select the group you want to send an email to. You can also select your search criteria to create and save a group.
3. Click the Send email to everybody in this group button . OrgPublisher opens your email client and displays the email addresses in the To field.

Note: *OrgPublisher defaults the maximum number of email addresses to "20." The Administrator can override this number when using the Publishing Wizard.*

4. Type your message and send the email in the normal method.

Spotlighting Groups in the Chart View

When you want to spotlight a group in the Groups View, or dim boxes that are not part of the group, you can reduce the opacity of the boxes that are not part of the selected group. This makes finding the group boxes in the *Chart View* much easier. You can use this feature alone or you can use it in conjunction with spotlighting search results.

Note: *The Spotlighting feature works only in View Mode.*

1. To enable the spotlight group feature, select a group to display in the chart from the *Groups View*.
2. Right-click on the group label in the Style Bar to view the options list.
3. Select **Group filter in chart** then **Spotlight boxes in group**. The *Chart View* dims all boxes that are not part of the selected group.

   You can disable the spotlight group feature by following Step 3 and clearing the spotlight option by selecting **Show only boxes in group**.

Note: *When printing a chart with the spotlighting feature enabled, if your printer does not support AlphaBlend, your printed chart will show all boxes as in the past. See your IT administrator if you have any questions.*

Using the Group Editor Dialog

The *Group Editor* dialog displays all the existing groups for your chart, and enables you to modify those groups or create new groups. An advanced search allows you to search the existing group list or create another query and add that search criterion to the group. You can also add a group icon to display next to names of each person in a selected group.

You can display the existing group list by clicking on the group button  in the toolbar to open the *Search* dialog, and then clicking on your group in the **Groups** tab and **Search Now**. You can also open the *Search View* pane in the List View, click on the **Groups** tab and then click on your group.

You can sort the group list by clicking on a column or you can use the group list to navigate through the chart. Click on a record and OrgPublisher moves to that box in the group chart. Advanced users can create extensive searches using the existing groups and adding additional search criteria.

Note: *When working with a published EChart, you can add new groups, but the existing groups cannot be modified or deleted. The new group cannot be displayed in the published EChart Chart View.*

1. Click the Search button  in the toolbar. The *Search* dialog opens. You can also select **Edit** from the menu and **Search** from the drop-down list.
2. Click the **Groups** tab.
3. To modify an existing group, double-click on that group to open the *Group Editor* dialog. Click **Search Now** to display the group list in the lower portion of the dialog.

   To create a new group, click the New Group Definition  button in the *Search* dialog. The *Group Editor* dialog opens.
   You can also open the **Search View** pane in the *List View* and click the **Groups** tab. Click the Edit Group Definition button  to open the *Group Editor* dialog.

4. To add search criteria, click Add  to copy the last criteria line, then modify it by using the **And/Or**, **Search Field**, **Compare**, **Value**, and **Match Case** fields. Click on the values in those fields and select the option you want to use from the drop-down list.

Note: *If you delete the custom position type, the records will return to the original position type assigned.*

Do not mix groups based on position type with position types based on groups.

5. When you have added all the search criteria, click **Search Now** to conduct the search. If you are modifying an existing group, the results are added to that list. If you are creating a new group the results display.

6. If you want to add a group icon to each person's box within the group, select the down-arrow in the **Displayed image for people in this group** field and select the icon you want to use. You can also click Other and navigate to an icon of your choice.

7. Select a radio button for the icon size. **Small icons** inserts 16X16 pixel icons. **Large icons** inserts 32X32 pixel icons.

8. If you have created this group for security purposes, you can hide the group from end users by selecting the **Hide this group in published chart** check box.

Note: *Hidden groups are removed from the Search dialog, Search View, Groups View, and Chart View in both the published chart and the application. The group can be accessed in the application using the Groups tab of the Search View or Search dialog.*

9. To delete an existing group criterion, highlight the record and click Remove  .

10. Save the changes to an existing group by clicking **Save**. Save to a new group by clicking **Save As**.

11. You can continue to build criteria for additional groups or click **Cancel** to close the *Group Editor* dialog and return to the *Search* dialog or Search View.

Note: *If EChart security is enabled, the published EChart reflects only the information accessible to the user, although field labels display in the dialog.*

CHAPTER 7

CREATE SUMMARIES

Note: *The Summary View is not available in published real-time charts.*

Successor candidate position types are not included in head counts or summaries.

Orphan records and broken hierarchies can adversely affect summary and security functions. Unexpected results can occur that may cause head count or other totals to be incorrect.

In conditional formatting, the search feature and all calculations follow the conditional position type. Formatting follows the group. If you display the Summary View in a chart with conditional formatting, you should hide either the group or position type of the conditional format. If you don't, head counts display in both areas.

Selecting Summary Types

There are several types of summaries you can insert in your organizational chart. You can use the Summary Wizard to create the summary field and select the summary type. You can also assign summary type in the *Custom Field Properties* dialog.

When building from data, OrgPublisher writes (and rewrites as data refreshes) to these fields based on calculations. When selecting a summary field you are prompted to select a field type, for instance **Average** or **Percentage**, and what population you want to include in the calculation. When your chart is republished or refreshed, these data fields may change, depending on your source data.

The summary field types are:

Summary Field Type	Example
Sum	Total sales per district
Average	Tenure in company
Minimum	Training hours for all employees
Maximum	Sales by or for all employees
Percentage	Department sales to total sales

Selecting Summary Types in Custom Field Properties Dialog

1. Select **Data** from the Main menu then **Custom field properties** from the pull-down list. The *Custom Field Properties* dialog opens.
2. Select the summary field record by clicking inside the box to the left of the **Field label** column.
3. **TAB** to the **Type** column and click inside the field.
4. Use the scroll bar to locate the field type you want to assign. Click the type, such as **Sum**. See the Formatting Numeric Custom Fields procedure for additional information.
5. Click **Apply**.
6. Repeat Steps 2 - 5 to assign summary types to additional custom fields or click **Close** to exit the dialog.

Selecting Summary Types in the Summary Wizard

1. Select **Tools** from the Main menu then **Summary Wizard** from the pull-down list. The Summary Wizard opens.
2. Click **Next**. Click inside the **Numeric Field to Summarize** field and select the summary field from the options list.
3. Click inside the **Type of Summary** field and select the summary type you want to assign. Click **Next**.
4. Click inside the **Population** field and select the population for the summary field, for instance position type or group. Click **Next**.
5. Type the name you want to use for the summary in the **Label** field. Click **Next**.
6. Select the **Hide label** check box if you do not want to display the label in the chart.
7. Select the position types or **All Position Types** you want to display the summary. Click **Next**.
8. Click **Finish**.

Adding a Summary Field

1. Select **Tools** from the Main menu, then **Summary Wizard** from the pull-down menu. The Summary Wizard opens to the first dialog. Click **Next**.
2. Select the existing **Numeric Field to Summarize**. Select the **Type of Summary**. Click **Next**.
3. Select the **Population** to include the summary total. You can choose a specific position type, custom field, total head count or group. Click **Next**.
4. Type the **Label**, or name, for the summary field. Select the **Hide label** check box if you do not want the label to display in the chart. Click **Next**.
5. Click on the position type to display the summary. Select where in the position type you want the field displayed. Repeat for each position type. You can also select **All Positions**. Click **Next**.
6. Click **Finish**. The summary field displays in your chart.

Copying Workforce Analysis Graphs

You can copy workforce analysis graphs to the clipboard in order to paste into other applications.

1. Open your chart then open the Summary View.
2. Select the **Graphs** tab and verify that the graph is the correct type and size.
3. Click the Copy button 

in the **Graphs** tab toolbar. The graph is copied to the clipboard.
4. Paste the graph into another application.

Displaying Summary Fields

In OrgPublisher, summary fields inserted in the top box of the displayed portion of the chart are also displayed in the *Summary View*. These fields can be hidden in the Chart View while still shown in the Summary View. Summary fields you may want to display include group totals, position type totals, or sales figures.

1. To show or hide summary fields in the *Chart View*, right-click on a blank spot in the chart and select **Show / Hide chart components**.

   You can also click the Show/hide chart components button  in the toolbar. The *Show/Hide Chart Components* dialog opens.

2. Click on the position type or group you want to modify, or click **All Position Types** to select a component for all position types. Navigate to the summary field you want to show or hide, and click on the green arrow or red **X**. The arrow indicates the field is shown in the Chart View. The **X** indicates that it is hidden.

3. Select the component in the position type or group you want to show or hide. Click **OK**.

4. To show or hide summary fields in the Summary View, right-click on a column name and select **Show / Hide columns**. The *Show/hide Fields* dialog displays the names of the columns shown in the view.

5. Scroll to the summary column names and select the corresponding check box. To move a column in the view, click the **Move Up** or **Move Down** button.

6. To show or hide specific fields, such as a group total or head count, right-click on a row in the *Summary View* and select **Show / Hide rows**. The *Show/hide Fields* dialog displays the names of the field totals in the view.

7. Scroll to the summary field names and select the corresponding check box. To move a field up or down in the *Summary View*, click **Move Up** or **Move Down**.

8. Click **OK** to accept the changes and close the text box. The summary fields display in the *Summary View*.

Inserting a Summary Field

You can add a summary field at the end of or within the list of custom fields displayed in the *Custom Field Properties* dialog.

1. Select **Data** from the Main menu then **Custom Field Properties** from the pull-down menu. The *Custom Field Properties* dialog opens.

   You can also click the Custom fields button  in the toolbar.

2. Position the cursor where you want to add the new custom field, either somewhere within existing fields, or at the end. Click **Insert**.

If you are inserting a field within the list of existing fields, a message dialog verifies that this is what you want to do.

3. Enter the field name in the **Field label** column.
4. Press the **TAB** key to move to the **Type** column and select a **Summary type**.
5. Click in the **Calc Field** and select a numeric custom field to summarize.
6. Press the **TAB** key to move to the **Population** column and select the position types or groups you want to count. You can select one or more position types or groups, a combination of position types and groups, or **All Position Types**.
7. Press the **TAB** key to move to the **Assigned To** column. The *Update Displayed Custom Fields* dialog opens. Select the position types or groups for this custom field. If you want all position types to have this field, select **All Positions**.
8. The **Sample** field information displays the contents of the first custom field for a selected type.
9. The **Seq.** field displays the OrgPublisher Input File Record sequence for that custom field.
10. Click **Close** to insert the new summary field in your org chart and to close the *Custom Field Properties* dialog.

Showing Head Count for a Selected Portion of Your Chart

1. Select **View** from the Main menu then **Status Bar** from the options list. Each Status Bar option displays a check mark when selected.
2. Click **Head count** to show the actual head count for the displayed portion of the chart.
3. Select **Planned** to show the planned head count for the displayed portion of the chart. This option includes the actual head count plus the number of open positions displayed in your chart.
4. Click a box title to select the box. People in the selected reporting boxes are also counted. Total head count on the Status bar changes to **Selected Head Count**, and OrgPublisher displays the head count for the selected boxes.

Showing Head Count for a Single Job Title

1. Select **View** from the Main menu then **Status Bar** from the pull-down menu. A drop-down list displays the Status bar options. Each option selected for display is checked.
2. Verify that **Head count** is selected to show the actual head count for the displayed portion of the chart.
3. Verify **Planned** is selected to show the planned head count for the displayed portion of the chart. This option includes the actual head count plus the number of open positions displayed in your chart.
4. Click on the job title in the chart. **Total Head Count** on the Status bar changes to **Job Head Count**, and the head count for the selected title is displayed.

Showing Head Count for Each Box

1. Select **Format** from the Main menu then **Boxes** from the pull-down menu. You can also click the Format boxes button  in the toolbar. The *Format* dialog opens to the **Boxes** tab.
2. Select the position type of the first position shown within a box.

Note: *If the position type you select is not at the top of the box, the head count for the box is not shown.*

3. Select **Show Head Count**. Each box with the selected position type at the top displays the planned head count in the bottom right corner of the box. This option shows the open and filled positions with **Count** indicated as **Yes**.

Showing or Hiding Actual Head Count

1. Select **View** from the Main menu then **Status Bar** from the pull-down menu. The Status Bar options display in an options list. Each option displays a check mark when selected.

Note: *Keep in mind when you choose to show or hide fields that all information you can view in the OrgPublisher chart or search results list is also displayed when you copy the chart to Microsoft PowerPoint or the search results to Microsoft Excel.*

2. Click **Head count** to show the actual head count for the displayed portion of the chart. Or, clear it to hide the actual head count.

Shown Head count displays in the lower right section of the Status bar.

CHAPTER 8

PREVIEW AND PRINT YOUR CHARTS

Note: *If you choose to print a chart legend in your org chart, it does not display in the Book Style Print Preview. It does, however, print.*

Changing the chart layout can nullify previous modifications made in Print Preview, so you should select your layout before performing other tasks such as setting levels or zooming in or out.

You must have Print Wizard selected in File> Print Options in order access the Book Style Print Preview.

Previewing a Book Style Chart

You can preview charts before printing them to check how the chart fits on the pages. The Chart View is the only one you can preview. Modifications made in the *Print Preview* window now enable you to fine-tune a chart for printing, for instance, by moving boxes or a selection of boxes or changing the chart layout.

Using the toolbar, you can move boxes, change box layouts, zoom in or out and select and move boxes. When in "grab" mode, clicking on a box selects it. When selecting boxes, the first click on a box selects the box and all reporting boxes. The second click selects just that box.

If you have **Print Wizard** selected in the **Print Options**, and you select **File**, **Print Preview**, the *Print Preview Type* dialog opens, requiring a selection of either **Book style print preview** or **Wall chart print preview**. The default selection is the preview type you used last.

1. Select **File** from the menu bar, then **Print Preview** from the pull-down menu. The *Print Preview* dialog opens and the chart displays as it will print for each page. You can also click on the Print Preview button  in the toolbar. The *Print Preview Type* dialog opens.
2. Select the **Book style preview** radio button and click **Show Preview**. The *Book Style Print Preview* dialog opens and the chart displays as it will print on each page. The top pane displays thumbnails of each page. The lower pane displays the selected page. The *Book Style Print Preview* enables you to format individual pages. Each page is displayed in a thumbnail.

3. The *Print Preview* Menu bar contains buttons that enable you to print, modify your Book Style print settings, or cancel the preview. Click on a button for its definition.

Button	Action Performed
	Click this button to print the chart. This button opens your system *Print* dialog.
	Click this button to open the *Book Style Print Settings* dialog. You can also access the *Print Header/Footer Options* dialog, the page customization list, or enable the Print a chart legend feature.
	This button closes the *Book Style Print Preview* dialog.
	Click this button to print only selected pages.
	Click this link to access the OrgPublisher *Printing Tips* web page for ideas on successfully printing your chart.

4. You can use the Print Preview toolbar buttons to change the layout for the printed page, change the number of levels to print on a page, and zoom to a selected percent per page.

Button	Action Performed
	Click this button to select **Layout 1**, the layout with the lowest level of each branch in the chart arranged in a horizontal line. This creates shorter, wider charts.
	Click this button to select **Layout 2**, the layout with the lowest level of each branch in the chart arranged in a vertical row. This creates narrower, taller charts.
	Click this button to select **Layout 3**, the layout with the lowest level of each branch in the chart arranged with the boxes side by side. This creates more compact charts.

Button	Action Performed
	Click this button to select **Layout 4**, the layout with the lowest level of the chart (displays only two levels) arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level. The number of boxes across is determined automatically or set to a specific number.
	Click this button to select the number of levels from the drop-down list that you want to display.
	Click this button to set the zoom percent for the chart display. The default is **Zoom to fit**.
	Click this button to use the *Compact Build Mode* in the print preview.
	Click this button to place employees in individual boxes below the supervisor box. (Same as **Auto Build** option.)
	Click this button to place employees in a box below the supervisor box. (Same as **Auto Build** option.)
	Click this button to place employees in the same box as the supervisor. (Same as **Auto Build** option.)
	Click this button to reset the chart boxes with employees and supervisors in normal build. (Same as **Auto Build** option.)

5. Click **Print** to print the chart. This button opens your system Print dialog.

6. Or, you can close the *Print Preview* without printing the chart by clicking **Cancel**.

Changing the Chart Layout in the Book Style Print Preview

The *Book Style Print Preview* window enables you to modify your chart by changing the chart layout on each page to better fit on a printed page.

1. Open *Print Preview* by selecting **File** from the menu bar, then **Print Preview** from the pull-down menu. You can also click on the Print Preview button  in the toolbar. The *Print Preview Type* dialog opens.

2. Click the **Book style preview** radio button then **Show Preview**. The *Book Style Print Preview* window opens and the top pane displays thumbnails of each page as it will print. The lower pane displays the selected page.

3. To change the chart layout for a specific printed page, select the page you want to modify in the thumbnail pane and click one of the layout buttons in the toolbar.

Chart Layout button	Chart Layout Description
	**Layout 1** - Click this button to select the layout with the lowest level of each branch in the chart arranged in a horizontal line. This creates shorter, wider charts.
	**Layout 2** - Click this button to select the layout with the lowest level of each branch in the chart arranged in a vertical row. This creates narrower, taller charts.
	**Layout 3** - Click this button to select the layout with the lowest level of each branch in the chart arranged with the boxes side by side. This creates more compact charts.
	**Layout 4** - Click this button to select the layout with the lowest level of the chart (displays only two levels) arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level. The number of boxes across is determined automatically or set to a specific number.

4. Click **Print** if you want to print the chart or **Cancel** the print preview without printing.

Choosing Book Style Print Settings

When publishing or printing your chart in PDF format, you can accept default settings, or select settings of your own when the Publishing Wizard reaches the *Settings* dialog. These include chart settings, paper, font and image choices. PDF settings not only help you arrange the chart to fit on pages in the PDF file but will also affect the printed document.

The *Settings* dialog is similar to the dialog used in the *Book Style Print Preview*. You can accept defaults, work with the classic book style print settings such as chart layout 4, or select custom optimizer settings.

Settings Option	Description
Use classic book style printing - all pages are printed using layout 4	Select this radio button if you want to print the Book Style chart which uses chart layout 4, stacked boxes. There are two levels of the organization per page and the lowest level is arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level.
Use the page optimizer	Selecting this radio button enables you to make several choices to customize the PDF print settings. **Use standard settings** is the default option. You can move the slider to optimize more or less. If you choose to optimize more, OrgPublisher will fit as many boxes on a page as possible. If you choose to optimize less, OrgPublisher will print fewer boxes on a page.
Use easy settings	Select this radio button to use the slider to print your chart on **More pages** or **Fewer pages**. OrgPublisher automatically arranges the chart to best fit the boxes on the pages.
Preferred layout	Choose the radio button to print your chart pages in one of the layout options.
Use custom optimizer settings	Select this radio button to print your chart as a book using custom optimizing settings.
Custom settings	Click this button to open the *Advanced Page Optimizer Settings* dialog. In some cases, the default criteria used by the page optimizer may not produce the fewest pages possible for printing your Book Style chart. You can adjust those settings using the *Advanced Page Optimizer Setting*s dialog, selecting the maximum number of reporting boxes and the layout to display per page. When a page fits none of the criteria selected in the Advanced Settings dialog, OrgPublisher prints the chart using **layout 4** with two levels displayed.
Page customization list	Select this option to view a list of boxes that you have either customized within the *Print Preview* window, or have chosen to print at the top of each page of your book style chart. In order to print a box at the top of a page, you must first select the box for this purpose in the *Chart View*, by right-clicking on a box and selecting **Top of Page**.
Depth	Click the down-arrow and select the number of levels you want to include.

Settings Option	Description
Automatically set row size	Selecting this radio button enables OrgPublisher to automatically select the number of boxes to print per row.
Specify maximum row size	Selecting this radio button enables you to specify the number of boxes per row to be printed on a page.
Print index	Select this check box if you want to print an index for the book style PDF printed chart.
Include Legend	Select this check box to print the chart legend.
Print Header	Select this check box to print a header in your chart.
Hyperlinks	Select this check box to include existing hyperlinks in the PDF.
Show page number circles	Select this check box if you want to print the connecting page numbers in circles on each printed PDF page.
Print Footer	Select this check box to print a footer in the chart.

Once you've published the chart, a dialog displays the progress of the PDF conversion. After the conversion is complete a message box displays the number of chart pages created.

Note: *Options available in the dialog vary, depending on whether you are printing to PDF or sending to PowerPoint. Publishing to a PDF format is available in OrgPublisher Enterprise and OrgPublisher Premier.*

Creating a Book Style Top of Page List

You can create a list of boxes that you want to print at the top of pages in your Book Style printed chart or PDF published chart.

1. In the Chart View, right-click on a name or box you want as the top of a page in your Book Style printed chart. This box must be a hierarchically logical box, such as a manager's box. An assistant's box cannot be selected as the top of a page.
2. Select the **Top of page (Book style printing)** option. When you open the print preview, the selected box will display at the top of the page for the selected hierarchy.
3. Select **File** from the menu and **Print preview** from the pull-down list. The *Print Preview Type* dialog opens.
4. Select the **Book style preview** radio button and click **OK**. The *Book Style Print Preview* opens.
5. Click **Settings**. The *Book Style Print Settings* dialog opens.

6. Select the **Page customization list** button. A list box displays a list of pages with custom settings, including selected names for top of page.

   You can remove a name from the top of page list by clicking on the corresponding check box and clicking **Remove checked items**. The name is removed from the list and, if it is not a hierarchically logical top of page box, that page no longer displays in the preview pane.

Note: *Because Book Style printing handles hierarchy in a consistent manner, you may right-click on a box and see that this option is not enabled. Similarly, you cannot remove a "hierarchically logical" top of page box.*

Modifying Book Style Print Settings

You can modify your initial settings made while in the Print Wizard for Book Style printing in the *Book Style Print Preview* window.

1. Follow the *Print Wizard* to the *Settings* dialog, which provides several options to choose from when printing your chart as a book.

2. Select the **Use classic book style printing** radio button if you want to print all pages using chart layout 4.

Use the page optimizer

3. If you choose to use the optimizer for printing your chart as a book, you can accept automatic optimizer settings or customize the settings.

Setting	Description
Use easy settings	Select this radio button to use the slider to print your chart on **More pages** or **Fewer pages**. OrgPublisher automatically arranges the chart to best fit the boxes on the pages.
Preferred layout	Choose the radio button to print your chart pages in one of the layout options.
Use custom optimizer settings	Select this radio button to print your chart as a book using custom optimizing settings.

Setting	Description
Custom settings	Click this button to open the Advanced Page Optimizer Settings dialog. In some cases, the default criteria used by the page optimizer may not produce the fewest pages possible for printing your Book Style chart. You can adjust those settings using the *Advanced Page Optimizer Settings* dialog, selecting the maximum number of reporting boxes and the layout to display per page. When a page fits none of the criteria selected in the Advanced Settings dialog, OrgPublisher prints the chart using layout 4 with two levels displayed.
Page customization	Select this option to view a list of boxes that you have either customized within the *Print Preview* window, or have chosen to print at the top of each page of your book style chart. In order to print a box at the top of a page, you must first select the box for this purpose in the Chart View, by right-clicking on a box and selecting **Top of Page**.
Depth	Click the down-arrow and select the number of levels you want to include.

4. You can select the **Use easy settings** radio button and use the slider to enable OrgPublisher to print on more or fewer pages. If you choose **More pages**, OrgPublisher will print fewer boxes on a page. If you choose to **Fewer pages**, OrgPublisher will fit as many boxes on a page as possible.

5. Using the standard settings, select a **Preferred layout** to print your chart pages.

6. You can select the **Use custom optimizer settings** radio button and click **Custom settings** to open the *Advanced Page Optimizer Settings* dialog.

   In some cases, the default criteria used by the page optimizer may not produce the fewest pages possible for printing your Book Style chart. You can adjust those settings using the *Advanced Page Optimizer Settings* dialog, selecting the maximum number of reporting boxes and the layout to display per page.

   When a page fits none of the criteria selected in the *Custom Settings*, OrgPublisher prints the chart using layout 4 with two levels displayed.

7. You can set a maximum number of report boxes and select a layout and the number of levels to print on a page in order to print your chart on as few pages as possible. Click **OK**.

8. If you have already previewed your chart and selected boxes to print at the top of each page, you can select **Page customization list** in order to delete any as a top of page box. Deleting the box from this list does not remove the box from the chart. Click **OK**.

Boxes across on book style pages

9. You can allow OrgPublisher to determine the chart row size or manually select the number of boxes in a row.

Setting	Description
Automatically set row size	Select this radio button to let OrgPublisher set the number of boxes per row and size these boxes to fit each page.
Set maximum row size	Select this radio button to manually set the maximum number of boxes to be printed in a row. The minimum number of boxes across is 4. (The chart style is automatically stacked, which means there are two levels of the organization per page and the lowest level is arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level.)

Note: *The Settings dialog displays different settings, depending on whether you are publishing, and thus printing, to PDF or just printing a book.*

10. You can choose to **Print index** to accompany your book pages.
11. Select **Show page number circles** if you want each book style page to print the circled page numbers.
12. Select **Show the print preview** check box if you want to modify individual pages in the book style print job.
13. If you want OrgPublisher to adjust the size of the boxes to fit on each page, select the **Zoom each page to fit** radio button.
14. Click **Next**. Click **Header/Footer** to change either the header or footer text. The *Print Header/Footer Options* dialog opens.
15. Follow the prompts to select header and footer options. Click **OK** to accept the changes and close the dialog.
16. If you have included groups in your chart, or use custom colors, you can select the **Include Legend** check box to help identify the groups and colors by the icons displayed in the chart legend.

17. Click **Finish** to complete the Print Wizard.

Saving the Book Style Page Modifications

With OrgPublisher you can save any modifications you make to individual pages in the *Book Style Print Preview* and PDF publishing format.

1. Open the *Book style preview* to change page layouts or zoom percent.
2. Click **Settings**, and use the *Book Style Print Settings* dialog to suppress the display of page numbers in circles, or delete a specified top of printed page box.
3. You can click **Page customization list** to open the *Book style page customization* list box and review the pages which you have customized or chosen a specific top of page box.
4. You can select a page or all of the pages, and remove them from the customization list. This deletes the modifications you have made in the Book Style Print Preview. Click **OK** or **Cancel** to return to the *Book style print settings* dialog.
5. Continue with the settings modifications or click **OK** to return to the *Book Style Print Preview*.
6. Click **Print** to print the Book Style chart or **Cancel** to return to the Chart View without printing.
7. A message displays asking if you want to save your changes. You do not have to save the settings in order to print the customized pages. Click **Yes** to save the page customizations or **No** to discard them.
8. The *Book Style Print Preview* closes and your system printer *Settings* dialog may open before the print job completes.

Selecting Pages to Print in Book Style Preview

With OrgPublisher 8.1 and later, you don't have to print the entire book in the *Book Style Print Preview* - you can select just the pages you want to print.

1. Select **File** from the Main menu then **Print Preview** from the pull-down menu. The *Print Preview Type* dialog opens. You can also click on the Print Preview button  in the toolbar.

2. Click **Show Preview**. The *Book Style Print Preview* window opens, and the chart displays as it will print for each page. The box with the yellow border indicates the current view shown in the preview. See the *Previewing a Book Style Chart* procedure for additional tasks you can perform.

3. Click the Select pages to print button to enable the selection of specific pages for printing. The *Selective printing mode enabled* message notifies you that selective printing is enabled. You can choose not to display the message again by selecting the **Don't show this dialog again** check box. The individual page thumbnails now include a printer icon .

4. Select the pages that you do NOT want to print. The print icon changes .

5. If you choose not to print only selected pages, click Cancel print page selection. You can also right-click on a printer icon to use the context menu. Options are **Select all pages to print** and **Clear all pages**.

   If you choose to print the selected pages only, click Print....

Previewing a Wall Style Chart

Note: *Note that the connecting line moves with the box. Because OrgPublisher is not a drawing tool you do not want to move the box across from or above its manager box because the reporting line draws through it. If you select the top box in a hierarchy, all reporting boxes move as well. Remember these basic rules when moving boxes:*

- Vertical lines move with the boxes.

- The boxes at the either end of a row must stay at the end because the corners of the horizontal and vertical lines which link these boxes are "owned" by the boxes.

- Unexpected results occur if you move boxes outside of the OrgPublisher hierarchical drawing standards. These standards assure that an OrgPublisher chart can be viewed without written explanation and be understood anywhere in the world.

You can preview charts before printing them to check how the chart fits on the pages. The Chart View is the only one you can preview. Modifications made in the *Print Preview* window now enable you to fine-tune a chart for printing, for instance, by moving boxes or a selection of boxes or changing the chart layout.

Using the toolbar, you can move boxes, change box layouts, zoom in or out and select and move boxes.

If you have **Print Wizard** selected in the **Print Options**, and you select **File**, **Print Preview**, the *Print Preview Type* dialog opens, requiring a selection of either Wall chart preview or Book style preview.

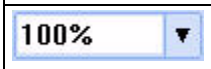
1. Open the *Print Preview* by selecting **File** from the menu then **Print preview** from the options list. The *Print Preview Type* dialog opens.

   You can also click the Print Preview button  in the toolbar.

2. The default selection is the preview type you used last. If you are not using the Print Wizard, OrgPublisher assumes you will print as a Wall style chart. Click **OK** to accept the default Wall chart preview type. The *Print Preview* dialog opens.

   The OrgPublisher *Print Preview* dialog contains a new toolbar, which offers additional flexibility and control when you print in Wall Chart style. The toolbar buttons include:

Button	Action Performed
	Click this button to reverse the latest action. May be repeated to **undo** additional actions.
	Click this button to **copy** the chart displayed in the preview to another application. Photos in the chart are also copied using this button.
	Clicking this button designates the selected box as the **top of chart** for the selected style.
	Click this button to **display the whole chart** from the highest box in the hierarchy.
	Click this button to select **Layout 1**, the layout with the lowest level of each branch in the chart arranged in a horizontal line. This creates shorter, wider charts.
	Click this button to select **Layout 2**, the layout with the lowest level of each branch in the chart arranged in a vertical row. This creates narrower, taller charts.

Button	Action Performed
	Click this button to select **Layout 3**, the layout with the lowest level of each branch in the chart arranged with the boxes side by side. This creates more compact charts.
	Click this button to select **Layout 4**, the layout with the lowest level of the chart (displays only two levels) arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level. The number of boxes across is determined automatically or set to a specific number.
	Click this button to move the entire Chart View to the **left**.
	Click this button to move the entire *Chart View* to the **right**.
	Click this button to move the entire *Chart View* **up**.
	Click this button to move the entire *Chart View* **down**.
	Click this button to set the **zoom percent** for the chart display.
	Click this button to **show or hide the header** text.
	Click this button to **show or hide the footer** text.
	Click this button to open the *Print Header/Footer Options* dialog and select your print options.
	Click this button to print a **chart legend** page.
	Click this button to select the number of **levels** from the drop-down list that you want to display.
	Click to display or hide the **drill** buttons for printing.

3. You can use the *Print Preview* toolbar buttons to set top of chart, display the whole chart, change the layout for the printed chart, move individual boxes, move the chart left, right, up or down, zoom in or out, show or hide headers and footers, print a chart legend, even open the *Print Header/Footer Options* dialog.

4. For a clearer view of the chart, move the cursor anywhere on the chart and click. The chart enlarges each time you click on it until it fills the page. When you click on a full-page display, it reduces to display the entire chart as it will print. You can also use the **Zoom In** and **Zoom Out** buttons to enlarge and reduce the chart.

5. The Menu bar contains buttons that enable you to print, move from page to page, zoom in or out and change from a one page view to two page. The Menu bar buttons include:

Button	Action Performed
Print...	Click this button to print the chart. If you have **Print Wizard**selected in **Print Options**, this button opens the Print Wizard. If you do no have **Print Wizard** selected, this button opens your system *Print* dialog.
Next Page	If your chart will print on multiple pages, click this button to view the next page.
Prev Page	If your chart will print on multiple pages, click this button to view the previous page. This button is enabled only after you've clicked **Next Page**.
One Page	This button indicates your chart can print on multiple pages. Click **Next Page** to see a page preview. After you have clicked this button, it reads **Two Page**. Click to return to the single page preview.
Two Page	If your chart will print on multiple pages, this button enables you to see two pages at a time in the preview window. This button is enabled only after you have clicked **Next Page**. After you have clicked this button, it reads **One Page** to return to the single page preview.
Close	This button closes the *Wall Chart Style Print Preview* dialog.

6. Click **Print** to print the chart. If you have **Print Wizard** selected in **Print Options**, this button opens the *Print Wizard*. If you do not have *Print Wizard* selected, this button opens your system *Print* dialog.

7. Or, you can close the *Print Preview* without printing the chart by clicking **Close** or **Esc**.

Changing the Chart Layout in Wall Style Print Preview

The *Wall Chart Print Preview* window enables you to modify your chart by changing the chart layout to better fit on a printed page.

Note: *Changing the chart layout can nullify previous modifications made in Print Preview, so you should select your layout before performing other tasks such as showing/hiding the header.*

1. Open *Print Preview* by selecting **File** from the Main menu then **Print Preview** from the pull-down menu. You can also click the Print Preview button  in the toolbar. The *Print Preview Type* dialog opens.
2. Select the **Wall chart preview** radio button then **Show Preview**. The *Wall Chart Print Preview* window opens displaying the chart as it will appear in print form.
3. To change the chart layout for the printed page, click one of the layout buttons in the toolbar.

Chart Layout button	Chart Layout Description
	**Layout 1** - Click this button to select the layout with the lowest level of each branch in the chart arranged in a horizontal line. This creates shorter, wider charts.
	**Layout 2** - Click this button to select the layout with the lowest level of each branch in the chart arranged in a vertical row. This creates narrower, taller charts.
	**Layout 3** - Click this button to select the layout with the lowest level of each branch in the chart arranged with the boxes side by side. This creates more compact charts.
	**Layout 4** - Click this button to select the layout with the lowest level of the chart (displays only two levels) arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level. The number of boxes across is determined automatically or set to a specific number.

4. Select **Print** if you want to open the Print Wizard to print the chart or Close the print preview without printing.

Copying the Print Preview Chart

You can copy the Wall style chart from the *Print Preview* window and paste it into another Microsoft® Windows application. The chart headers and footers are also copied.

Note: *This preview chart copy function copies with OLE embedding enabled, which enables you to manipulate the chart if you paste it into an application that can edit metafiles, such as Microsoft Word or PowerPoint.*

1. Open the *Print Preview* by selecting **File** from the Main menu then **Print preview** from the options list. You can also click the Print Preview button  in the toolbar. The *Print Preview Type* dialog opens.
2. Click **OK** to accept the default type or select the **Wall chart preview** radio button. The *Print Preview* window opens.
3. Modify the chart as needed, such as moving the chart or boxes, or selecting a new layout.
4. Click the Copy button  in the toolbar.
5. Paste the chart into the desired application. The chart displays in the new application.
6. Close the *Print Preview* dialog.

Moving Boxes in Print Preview

In OrgPublisher the *Print Preview for Wall Style* and *Print Preview for Book Style* dialogs enable you to modify your chart for printing by moving boxes (and the box reporting lines) to better fit on the page.

1. Open the *Print Preview* by selecting **File** from the menu then **Print preview** from the options list. The *Print Preview Type* dialog opens. You can also click the Print Preview button  in the toolbar.
2. Select the **Wall chart preview** or **Book style preview** radio button. The *Print Preview* dialog opens.
3. Select a box by clicking on it. The box is highlighted.
4. Holding down the mouse cursor, move the box to where you want it on the page.
5. Release the box by moving the cursor to a blank space on the page and click.
6. You can reverse that change by clicking the Undo button  .
7. Select **Print** if you want to open the Print Wizard to print the chart or **Close** *Print Preview* without printing.

Moving the Chart in Print Preview

In OrgPublisher, the *Print Preview for Wall Style* dialog enables you to modify your chart for printing by moving the chart left, right, up or down on the printed page.

1. Open the *Print Preview* by selecting **File** from the menu then **Print preview** from the options list. You can also click the Print Preview button  in the toolbar. The *Print Preview Type* dialog opens.
2. Select the **Wall chart preview** radio button and click **OK**. The *Print Preview* dialog opens.
3. To move the chart on the page, click one of the Move buttons in the toolbar. Click the Move button as many times as needed to move the chart to the location on the page that you want.

Button	Action Performed
	Click this button to move the entire Chart View to the **left**.
	Click this button to move the entire *Chart View* to the **right**.
	Click this button to move the entire *Chart View* **up**.
	Click this button to move the entire *Chart View* **down**.

4. You can reverse changes by clicking the Undo button  .
5. Select **Print** if you want to open the Print Wizardto print the chart or **Close** *Print Preview* without printing.

Opening Print Header/Footer Options in Print Preview

In OrgPublisher the *Print Preview for Wall Style* dialog enables you to modify your chart for printing by opening the *Print Header/Footer Options* dialog to modify your header and footer information.

1. Open *Print Preview* by selecting **File** from the Main menu then **Print Preview** from the pull-down menu. The *Print Preview* dialog opens

and the chart displays as it will print. You can also click on the Print Preview button  in the toolbar to open the *Print Preview*.

2. To open the *Print Header/Footer Options* dialog, click the Header/Footer button  in the toolbar.
3. Select the header or footer options you want in your printed chart and click **Apply** to accept the changes and continue working in the dialog or click **OK** to accept the changes and close the dialog.
4. Select **Print** if you want to open the Print Wizard to print the chart or **Close** *Print Preview* without printing.

Sending the Chart to Microsoft PowerPoint

With OrgPublisher you can copy the chart directly to Microsoft® PowerPoint. This provides enhanced chart graphic quality and flexibility within PowerPoint presentations. All the information you can see in the OrgPublisher chart is sent to PowerPoint.

Note: *This feature disables the header and footer options, as well as the index or chart legend for Book style. In addition, the page number circle drill buttons are not available for the copy to PowerPoint option.*

1. In the Main toolbar, click the Send to Microsoft PowerPoint button  . The *Microsoft PowerPoint Preview* dialog opens.
2. Select either the **Wall chart preview** or **Book style preview** radio button. Click **OK**. The *Microsoft PowerPoint Preview* window opens.
3. Make your modifications in the Wall style or Book style preview. If you click **Settings** in the *Book Style preview*, the *Book Style PowerPoint Settings* dialog opens. Follow the *Choosing Book Style Print Settings* procedure to choose the PowerPoint settings.
4. Click **Send**. The *Send to PowerPoint* dialog opens.
5. In the **Page Range** section, select which pages you want to send to PowerPoint, **Current Page**, **All Pages**, or **Pages** and enter the page numbers or range.
6. In the **Chart Options** section, select the optional chart features you want to send to PowerPoint. These features include **Show Drill Buttons**, **Chart Title**, which allows you to choose **Title is part of image** or **Title is part of slide**, and **Chart Background**, which

allows you to choose **Background is part of image** or **Background is part of slide**.

Note: *When previewing as Wall Chart the Show Drill Buttons option is not available.*

7. In the **PowerPoint Options** section, the default is **Use currently open presentation**. Clear this check box if a current presentation does not exist or you want to choose a different presentation.
8. In the **Image Options**, select **Copy as metafile** or **Copy as bitmap**.
9. Click **OK** once you have selected all the options you want to use. Microsoft PowerPoint opens with the chart embedded in the slides.

Showing/Hiding Headers and Footers in Print Preview

In OrgPublisher the *Print Preview for Wall Style* dialog enables you to modify your chart for printing by showing or hiding the header and footer information on the printed page. The default is to show and, therefore, print the header and footer. The *Print Preview* dialog displays the header and footer as they will print.

Note: *Keep in mind when you choose to show or hide fields that all information you can view in the OrgPublisher chart or search results list is also displayed when you copy the chart to Microsoft PowerPoint or the search results to Microsoft Excel.*

1. Open *Print Preview* by selecting **File** from the Main menu then **Print Preview** from the pull-down menu. The *Print Preview* dialog opens and the chart displays as it will print. You can also click on the Print Preview button  in the toolbar.
2. To hide the chart header, click the Show/Hide Header button  in the toolbar. The header text is hidden in the preview window and will not print. Click the Show/Hide Header button again to display and print the header text.
3. To hide the chart footer, click the Show/Hide Footer button  in the toolbar. The footer text is hidden in the preview window and will not print. Click the Show/Hide Footer button again to display and print the footer text.

4. Select **Print** if you want to open the Print Wizard to print the chart or **Close** *Print Preview* without printing.

Print Views and Charts

Running Print Setup

To select your printer, page size, page orientation, and paper source before you print a chart:

1. Select **File** from the Main menu then **Print Setup** from the options list. You can also click the Print Setup button in the toolbar. The *Print Setup* dialog opens with the default printer and settings.
2. Verify the selected printer, or select a different printer.
3. Verify the paper size or select a different size.
4. Verify the paper source or select a different source.
5. Select portrait or landscape orientation.
6. Click **OK** to save these settings as defaults.

Selecting Print Header/Footer Options

1. Select **File** from the Main menu then **Print Options** from the pull-down menu. The print options display in an options list.
2. Click one of the views to print. Available views depend on which views you have open in your chart.
3. Click on the header or footer if you want to modify one or the other. The *Print Header/Footer Options* dialog opens.

Header tab

Field	Description
Print Page Header	Select this check box to print a header in your chart.
Group	Select this check box to print the group name in OrgPublisher and PluginX.
Title	Select this check box to print a title for the chart.
Default Chart Title	Select this radio button to use the title shown on the chart.
Custom Title	Select this radio button in the *Print to type new title* text box.

Field	Description
Date and Time	Select this check box to show the date and time the chart was printed.
Date Format	Select the format to display the date and time, such as **MM/DD/YYYY HH:mm:ss**.
Date Prefix	Type text to precede the date or date and time on your chart, if any.
Print Date	Select this radio button to print the date that the chart is printed.
Data Modified Date	Select this radio button to print the date that the chart was last modified.
Font Customization	This section of the *Print Header/Footer Options* dialog displays a sample of the selected font and a button, **Select Font**, that opens the *Font* dialog to customize font information for the header or footer.

Footer tab

Field	Description
Print Page Footer	Select this check box to print a footer in your chart.
File Name and Location	Select this check box to print the drive and directory where the chart file is located, followed by the file name.
Head count	Select this check box to print the actual head count for the chart or the displayed portion of the chart.
Open positions	Select this check box to print the head count for positions that are listed in your chart but are not filled.
Planned Head count	Select this check box to print the total of actual and planned positions in your chart.
Page Number	Select this check box to print the page number on each page of the chart.
Font Customization	This section of the *Print Header/Footer Options* dialog displays a sample of the selected font and a button, **Select Font**, that opens the *Font* dialog to customize font information for the header or footer.

4. Select the header or footer options you want and choose a date format. Click **OK** to accept the changes and close the dialog.

5. Click on Print Wizard if you want to open it each time you print a chart. The options to print the chart as a book or wall chart are only available in the *Print Wizard*.

6. You can also use the *Print Preview* to temporarily remove a header or footer in the printed chart.

Customizing the Header and Footer Print Options

The header/footer print option enables you to display a group label, modify the chart title and date printed in the header, as well as select data to display in the footer such as head count, number of open positions, and the file name and location.

Now, you can also customize font information, such as type, size and color, for both header and footer in a printed OrgPublisher chart. Customized footers print above any other existing footer information.

1. Access the *Print Header/Footer Options* dialog by either using the Print Wizard or by selecting **File** from the Main menu, **Print Options** from the pull-down menu, and **Header or Footer** from the options list.

2. Make your selections in both the **Header** and **Footer** tabs, such as **Date Format**, **Group label**, or **Head count**, that you want to print.

3. The **Font Customization** section, in both tabs of the dialog, displays a sample of the current font used for the printed chart. You can change the font for either the header or footer, or both. Click **Select Font**. The *Font* dialog opens.

4. Select the **Font**, **Font style**, and **Size** for your text. Your selection displays in the **Sample** pane of the dialog.

5. You can also choose **Effects**, such as **Underline**, or **Color**.

6. When you have made your selections, click **OK** to accept your changes and close the *Font* dialog. If you accessed the *Print Header/Footer Options* through the *Print Wizard*, click **Finish**. Your system Print dialog opens.

7. Verify the print settings and print your chart.

Note: *You can also access the Print Header/Footer Options dialog from the Settings dialog in the Book Style Print Preview.*

Printing Your Chart as a Book

The Book Style printing option is available from the *Print Wizard* or the *Book Style Print Preview*. This procedure describes printing your chart

using the *Print Wizard*. If you want to modify your Book Style chart in more detail, see the *Previewing a Book Style Chart* procedure.

Book Style is a method of previewing or printing your chart as a single print job. You can include an index, print all or just selected pages, change the layout, or modify box settings. A books style print job is sent to a PDF file

1. Verify that your **Print Options** choice is set to **Print Wizard**.
2. Select **File** from the menu bar, then **Print** from the pull-down menu.

   You can also click the Print  button in the main menu. The Print Wizard opens.
3. If additional views are displayed in your chart, you can select the views you want to print. Click **Next**.
4. Select the **Book Style** radio button and click **Next**.
5. The *Settings* dialog of the *Print Wizard* provides several options to choose from when printing your chart as a book. Select the **Use classic book style printing** radio button if you want to print all pages using chart layout 4.

Use the page optimizer

6. If you choose to use the optimizer for printing your chart as a book, you can accept automatic optimizer settings or customize the settings.

Setting	Description
Use easy settings	Select this radio button to use the slider to print your chart on **More pages** or **Fewer pages**. OrgPublisher automatically arranges the chart to best fit the boxes on the pages.
Preferred layout	Choose the radio button to print your chart pages in one of the layout options.
Use custom optimizer settings	Select this radio button to print your chart as a book using custom optimizing settings.

Setting	Description
Custom settings	Click this button to open the *Advanced Page Optimizer Settings* dialog. In some cases, the default criteria used by the page optimizer may not produce the fewest pages possible for printing your Book Style chart. You can adjust those settings using the *Advanced Page Optimizer Settings* dialog, selecting the maximum number of reporting boxes and the layout to display per page. When a page fits none of the criteria selected in the *Advanced Settings* dialog, OrgPublisher prints the chart using layout 4 with two levels displayed.
Page customization list	Select this option to view a list of boxes that you have either customized within the Print Preview window, or have chosen to print at the top of each page of your book style chart. In order to print a box at the top of a page, you must first select the box for this purpose in the Chart View, by right-clicking on a box and selecting **Top of Page**.

You can select the **Use easy settings** radio button and use the slider to enable OrgPublisher to print on more or fewer pages. If you choose **More pages**, OrgPublisher will print fewer boxes on a page. If you choose to **Fewer pages**, OrgPublisher will fit as many boxes on a page as possible.

Using the standard settings, select a **Preferred layout** to print your chart pages.

You can select the **Use custom optimizer settings** radio button and click **Custom settings** to open the *Advanced Page Optimizer Settings* dialog.

In some cases, the default criteria used by the page optimizer may not produce the fewest pages possible for printing your Book Style chart. You can adjust those settings using the *Advanced Page Optimizer Settings* dialog, selecting the maximum number of reporting boxes and the layout to display per page.

When a page fits none of the criteria selected in the **Custom Settings**, OrgPublisher prints the chart using layout 4 with two levels displayed.

7. You can set a maximum number of report boxes and select a layout and the number of levels to print on a page in order to print your chart on as few pages as possible. Click **OK**.

8. If you have already previewed your chart and selected boxes to print at the top of each page, you can select **Page customization list** in order to delete any as a top of page box. Deleting the box from this list does not remove the box from the chart. Click **OK**.

Boxes across on book style pages

9. You can allow OrgPublisher to determine the chart row size or manually select the number of boxes in a row.

Setting	Description
Automatically set row size	Select this radio button to let OrgPublisher set the number of boxes per row and size these boxes to fit each page.
Set maximum row size	Select this radio button to manually set the maximum number of boxes to be printed in a row. The minimum number of boxes across is 4. (The chart style is automatically stacked, which means there are two levels of the organization per page and the lowest level is arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level.)

10. You can choose **Print index** to print an index of pages to accompany your book print.

11. If you are not already using the *Book Style Print Preview*, you can select the **Show the print preview** check box in order to view each page before you print the chart.

12. If you want the book pages to print page numbers, select the **Show page number circles** radio button.

13. If you want OrgPublisher to adjust the size of the boxes to fit on each page, select the **Zoom each page to fit** radio button. Click **Next**.

14. If you are using the *Settings* dialog from the *Book Style Print Preview* window, click **Header/Footer** to change either the header or footer text. The *Print Header/Footer Options* dialog displays. Follow the prompts to select header and footer options.

15. If you have included groups or custom colors in your chart, you can choose **Print legend** to print a chart legend that helps identify the icons displayed in the chart boxes.

Note: *Although not shown in the Book Style Print Preview window, the chart legend will print if this option is selected.*

16. Click **OK** to accept the changes and close the dialog.

17. If you are using the *Settings* dialog while publishing to PDF, you can choose to print a header and footer on each page, or clear the **Print Header** and **Print Footer** check boxes if you do not want them to print in the book pages.

18. Click **Finish** to start the printing process. The *Book Style Print Preview* dialog opens. Make any adjustments using the *Print Preview*.

19. When you are ready, click **Print**. Your system *Print* dialog opens. Verify your printer settings and click **OK**. Your chart begins to print as a book.

    Your printed Book Style chart contains **Next** and **Previous** page indicators, and prints the List View as an index at the beginning of the chart. The index contains the page numbers of the chart where employees are located and the custom fields associated with each position.

Printing in Wall Chart Style

The Wall Chart Style printing option is available from the *Print Wizard* or the *Wall Chart Print Preview*. This procedure describes printing your chart using the Print Wizard. If you want to modify your Wall chart in more detail, see the *Previewing a Wall Style Chart* procedure.

Buttons on the toolbar enable moving boxes, changing box layouts, and switching between zoom and grab modes. When in grab mode, clicking on boxes selects the box rather than zooming in/out.

1. Open the *Print Wizard* or, if you have turned off the **Print Wizard** option, select **File** from the main menu, then **Print** from the pull-down list. You can also click the Print button  in the main menu.

2. If you selected **File** then **Print**, the system *Print* dialog opens. Verify the printer options and click **OK**. The portion of the chart displayed in the Chart View prints.

   If you are following the *Print Wizard*, and additional views are displayed in your chart, you can select the views you want to print. Click **Next**.

Note: *You can turn the Print Wizard back on by selecting File from the main menu, Print Options from the pull-down list, then Use Print Wizard.*

3. Following the *Print Wizard*, select the **Wall Chart** radio button. Click **Next**.

4. Select the **Include Legend** check box if you are using group or custom item icons in your chart and need the chart legend to identify them.

5. Click **Header/Footer** if you want to include these in your chart. The *Print Header/Footer Options* dialog opens.

   The **Header** tab prompts you to indicate if you want to print a page header, select chart title options and the date and time formats.

   If you select the **Group label** check box, the name of the group prints in the upper-left corner of the page.

   The **Footer** tab prompts you to indicate if you want to print a page footer and select the fields you want to see in the footer.

   See the Selecting Print Header/Footer Options procedure for detailed header and footer information. In addition, see the Customizing the Header and Footer Print Options procedure for information on formatting fonts.

6. When you have made your header and footer selections, click **Apply** to accept the changes and continue using the dialog or click **OK** to accept the changes and return to the Print Wizard.

7. Click **Finish** to print your chart.

Note: *If you want to view your chart before printing, select File from the OrgPublisher main menu, then Print Preview.*

Printing a View

You can print views that display specific information about your chart. For example, the Summary View displays the summary fields you have set up by each position type. A print preview is available only for the Chart View.

You can print side-by-side profiles by selecting Profile View.

Note: *If you are working with a published EChart, because of its size, the Print List feature is available only for the List of currently displayed pane. You can, however, use the Search feature and select the Everyone group, then copy the list to the clipboard, paste the list into another application and print it.*

1. Open your chart.

2. Select **File** from the Main menu then **Print Options** from the pull-down list. The available views are displayed in your chart.



Figure 112

3. Select the view you want to print. If a view is "grayed-out," it is not available in your current chart style. Click **OK**.

4. Select **File** from the Main menu then **Print**. At this point, depending on your print options, the Print Wizard may open. Follow the prompts to print the view.

5. If the system *Print* dialog opens, select the portrait or landscape orientation.

6. Click **OK** to accept these settings as defaults and print the view.

Printing the 9 Box Matrix

You can print the *9 Box Matrix* if the *Print Wizard* has been activated. The user will be prompted to print the chart or the *9 Box Matrix*. If the *9 Box Matrix* is maximized, the matrix prints automatically.

Printing Graphs

You can print graphs when the *Print Wizard* is enabled. To print a graph, open the Summary View and select the *Graph View*. Each graph prints one to a page.

Printing the List View

You may want to print the List View as your telephone listing or, depending on the custom field data that you have added, as a convenient data index. You can print the *List View* with the Print button, as described

here, or the Print Wizard, depending on the options you have selected. The *List View* must be open in your chart in order to print it.

1. Open your chart then open the List View by selecting **View** in the Main menu then **List View** in the options list. You can also click the List View button  in the Views Toolbar.
2. Select **File** from the Main menu then **Print Options** from the pull-down list.
3. Verify that **List View** is selected in the options list and that **Print Wizard** is not selected.
4. Click the Print button  to open the system *Print* dialog. Verify the printer location and click **OK**.

Note: *The Search View can be copied to another Windows application. It is not a "printable" view.*

Printing the Profile View

You may choose to print the Profile View of an individual, for instance, to place a hard copy of the employee profile information in the employee file. You can print the *Profile View* using the Print button, as described here, or the *Print Wizard*. The *Profile View* must be open in your chart in order to print it.

1. Open your chart then open the *Profile View* by selecting **View** in the Main menu then **Profile View** in the options list. You can also click on the Profile View  button in the Views toolbar.
2. Select **File** from the Main menu then **Print Options** from the pull-down list.
3. Verify that **Profile View** is selected in the options list and that **Print Wizard** is not selected.
4. Click the Print button  to open the system *Print* dialog. Verify the printer location and click **OK**.

Printing the Summary View

You can choose to print the Summary View separately from your Chart View. You can print the *Summary View* using the Print button, as

described here, or the Print Wizard. The Summary View must be open in your chart in order to print it.

1. Open your chart then open the *Summary View* by selecting **View** in the Main menu then **Summary View** in the options list. You can also click on the Summary View button in the Views toolbar.
2. Select **File** from the Main menu then **Print Options** from the pull-down menu.
3. Verify that **Summary View** is selected in the options list. Clear the **Print Wizard** option if you just want to print the summary and not the Chart View.
4. Click the Print button to open the system *Print* dialog. Verify the printer location and click **OK**.

Printing a Chart Legend

If you use several group or custom icons in your chart, you can choose to print a chart legend when you print your chart using the *Print Wizard* or the *Print Preview*.

Note: *The chart legend does not display in the Book Style Print Preview. It does, however, print.*

1. Open the *Print Wizard* by clicking on the Print button or, if you have turned off the **Print Wizard** option, select **File** from the Main menu, then **Print Options** from the pull-down list and **Use Print Wizard** from the options list.
2. Follow the wizard dialogs to print either in Wall chart or Book style.
3. The last dialog enables you to choose header or footer options. If you select the **Include Legend** check box, your printed chart includes the legend on each page of your chart.
4. Click **Finish** to close the wizard and print your chart.

If you are using the *Print Preview* option and you have defined and enabled a legend, you can use the Add or remove legend button in the preview and select the **Include Legend** check box in the *Settings* dialog of the Book style preview.

The legend prints on one page in Wall style and on every page in Book style. You may need to make adjustments in your chart for the size of the legend so that it does not print over boxes.

Note: *Depending on where you place the legend, some boxes in the chart may be covered. You may want to modify the legend settings to better fit the legend within a blank area of the Chart View.*

Printing a Chart without the Print Wizard

You can print a chart from the menu options to print the Wall chart style as long as you have disabled the Print Wizard. Select **File**, **Print Options**, and, if **Use Print Wizard** is selected, click the option to clear it.

Note: *If you choose to turn off the Print Wizard, the Book Style print option is no longer available.*

1. Open the chart you want to print. If your chart has multiple styles, select the one you want to print.
2. Open the *Print Preview* by selecting **File** from the Main menu then **Print preview** from the options list. The *Print Preview Type* dialog opens. You can also click the Print Preview button  in the toolbar.
3. Click **OK** to accept the default **Wall chart previe**w type or select the **Book style preview** radio button. The *Print Preview* dialog opens.
4. To reduce the size of a chart that does not fit on a page, you can reduce the size of chart text, change the arrangement of chart boxes, reduce the space between boxes, or select **View**.
5. Select **File** from the Main menu then **Print** from the pull-down menu. The system *Print* dialog opens with the default printer and settings. Your *Print* dialog options may vary. You can also click the Print button  in the toolbar.
6. Verify the selected printer, or select a different printer.
7. Specify a range of pages, or select **All** to print the entire document.
8. Specify the number of copies to print. Click **OK** to print the chart.

CHAPTER 9

PUBLISH YOUR CHARTS

Standard Chart Publishing

Publishing in Express Mode

OrgPublisher now provides an **Express Mode** and **Advanced Mode** for publishing. **Advanced Mode** enables you to choose a publishing format, such as EChart rich client or thin client, as well as select all options prior to publishing. **Express Mode** prompts you with one screen of options prior to publishing.

Toolbar buttons are limited in charts published through **Express Mode**. Only the List View/Search View and the Profile View are available.

1. Click the Publish button 

in the toolbar. You can also select **Tools** from the Main menu then **Publishing Wizard** from the options list. If this is the first time you are publishing a chart, the Publishing Wizard opens. If a publishing definition already exists, the *Publish charts* dialog opens.

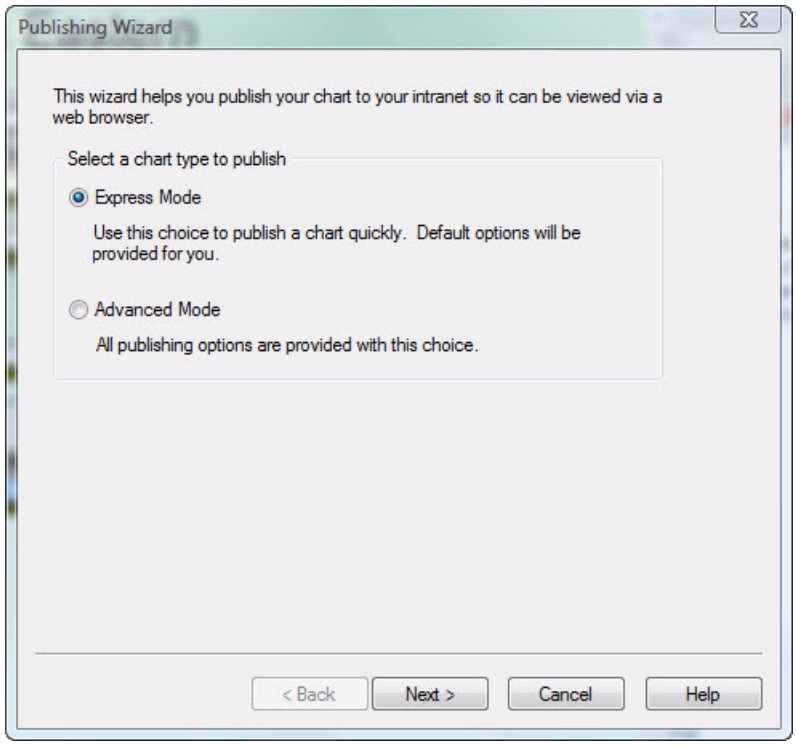

Publishing Wizard
This wizard helps you publish your chart to your intranet so it can be viewed via a web browser.
Select a chart type to publish
Express Mode
Use this choice to publish a chart quickly. Default options will be provided for you.
Advanced Mode
All publishing options are provided with this choice.
< Back
Next >
Cancel
Help

Figure 113

2. If the Publishing Wizard opens, select the **Express Mode** radio button. If the publish chart dialog opens, click **New** to open the *Publishing Wizard* then select **Express Mode**. Click **Next**.

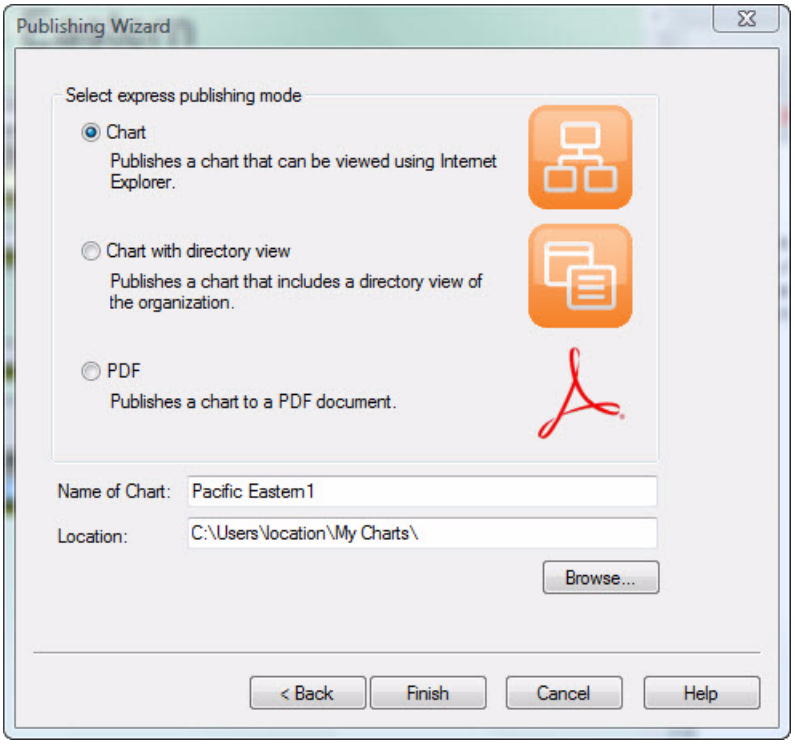


Figure 114

3. Select the type of express publishing you want. Options include:

Publishing Option	Description
Chart	Publishes a chart that can be viewed with Internet Explorer. (PluginX)
Chart with directory	Publishes a chart that includes a directory view of the organization. (telephone list)
PDF	Publishes a chart to a PDF document.

4. Accept the default or type the **Name of Chart**. The name can be the same as the chart name and does not need to include publishing information. The name must, however, be unique and cannot contain any special characters such as slashes (**** or **/**), colons (**:**), asterisks (*****), question marks (**?**), quotation marks (**"**), and greater than or less than symbols (**<** or **>**). The publishing definition name can be up to 255 characters.

Note: *OrgPublisher checks for invalid characters in this step and when you click Finish. Invalid characters are replaced with a dash (-). A message displays at the end of the wizard, and you can change the chart name to avoid the dashes.*

5. Accept the default **Location** or **Browse** to the location to save your chart file.

6. Click **Finish**. The *Publishing Summary* message displays the link, or links if you also chose to publish a **Chart with directory**, to your published charts. Click on the link to preview the chart.

Choosing a Publishing Format

You can choose one of several formats to publish your chart in OrgPublisher. These formats publish charts that fall into one of two categories, an interactive chart or an org chart document.

An interactive chart provides end users with a more flexible chart in which they can search, drill through chart levels, save groups, and even send email messages to a group. An org chart document provides end users with limited drilling and searching functions.

Interactive choices include PluginX and EChart. Org chart documents include HTML, graphic, and PDF.

Format	Browser	Platform
PluginX	OrgPublisher PluginX to view with Microsoft Internet Explorer 6.0 and later.	Windows
EChart	To publish to a Microsoft IIS or ISAPI-compliant Windows® 2000, Windows® XP, Windows® 2003 web server, or Apache™ HTTP Server 2.0+ running Windows. Offers both thin and rich client formats.	Windows
HTML	For cross-platform publishing.	Cross
Graphic	To publish in graphics format.	Cross
PDF	To publish a chart in a portable document format file.	Cross

The differences between the publishing formats are:

Feature	PluginX	HTML with drilling	HTML	Graphic	PDF	EChart
9 Box Matrix (Premier)	Yes	No	No	No	No	Yes
Side-by-side Profile (Premier)	Yes					Yes
Succession/org model planning (Premier)	Yes	No	No	No	No	Yes
Workforce analysis graph (Premier)	Yes	No	No	No	No	Yes
Express Mode publishing	Yes	No	No	No	Yes	No
Auto-archive charts	Yes	No	No	No	No	Yes
Chart design template	Yes	Yes	Yes	Yes	Yes	Yes
Chart legend	Yes	Yes	Yes	Yes	Yes	Yes
Hover Profile	Yes	No	No	No	No	Yes
Spotlighting groups and search results	Yes	No	No	No	No	Yes
Real-time publishing	No	No	No	No	No	Yes
Multiple viewing levels	Yes	No	No	No	No	Yes
Thin client	No	No	No	No	Yes Requires Adobe Acrobat Reader	Yes
Self-installing	Yes	N/A	N/A	N/A	Yes	Yes
Displayable views	Yes	List, Profile, Summary only	List, Profile, Summary only	No	No	Profile, Summary, and Tree not available in thin client List displays as an index
Secure published chart	Yes	No	No	No	No	Yes
Drilling navigation	Yes	Yes	No	No	No	Yes

Feature	PluginX	HTML with drilling	HTML	Graphic	PDF	EChar
Hotspot links	Yes	Yes	Yes	No	No	Yes
Smart links	Yes	No	No	No	No	Yes rich cli
Chart searches	Yes	No	No	No	No	Yes
Selectable chart styles	Yes	No	No	No	No	Yes
Selectable top of chart	Yes	No	No	No	No	Yes
Viewable on intranet	Yes	Yes	Yes	Yes	Yes	Yes
Viewable by MAC and Unix users	No	Yes	Yes	Yes	Yes	No
Zoom view	Yes	No	No	No	Within Acrobat Reader	Yes
Print preview Book or Wall style	Yes	No	No	No	N/A	Yes
Book style printing	Yes	No	No	No	Yes	Yes
Wall chart printing	Yes	No	No	No	N/A	Yes
Disabled printing	Yes	No	No	No	N/A	Yes
Ad hoc or My groups tab in Search View	Yes	No	No	No	N/A	Yes, rich cl
Email to a group	Yes	Yes	Yes	No	N/A	Yes, rich cl

Publish Your Charts with Advanced Features

Note: *OrgPublisher PluginX supports Microsoft Internet Explorer. The HTML file generated identifies the browser being used and checks for the necessary components.*

Web servers do not allow clients to schedule tasks. The OrgPublisher Web Administration Server allows you to publish charts manually. You can, however, open the desktop OrgPublisher version and schedule the publishing definition in the Publish charts dialog using the Web Administration SourceCharts folder.

1. Log on the server as an administrator or power user.

2. Open the desktop OrgPublisher application. (If default install is used, it would be in c:/program files/orgpubx).

3. Open the chart (found in the SourceCharts folder).

4. Schedule the publishing definition in OrgPublisher using the Schedules tab.

Also, when you are publishing to ECharts, you must manually schedule the BAT file created in the first manual publishing. To do this, open the Task Scheduler on the server to add the .BAT job.

You can modify the BAT file created through the Publishing Wizard to publish to a location other than the server. Doing this may increase publishing time if your chart is extremely large (200,000+ records) or if the server has limited resources.

The EChart option supports Microsoft Internet Explorer and requires a Microsoft IIS or ISAPI-compliant server. See the complete EChart publishing requirements.

When publishing to a network drive while logged off, it is necessary that you enter a UNC (Universal Naming Convention) path. A UNC is a way to identify a shared file in a computer without having to specify the storage device it is on. Do not use a relative path.

Due to security restrictions Web servers cannot access a UNC path. If your chart contains photos, use either a local path or a URL. The EChart option supports a Microsoft® IIS (ISAPI enabled) Windows® XP, Windows® 2003 web server, Windows® 2008 web server, or Apache™ HTTP Server 2.0+ running Windows.

Choosing Between Express and Advanced Mode Publishing

When publishing a chart in OrgPublisher, the Publishing Wizard lets you select **Express Mode** or **Advanced Mode**. Your choice depends on your needs for a particular published chart and its audience.

Express Mode enables you to quickly publish a chart in PluginX, directory view, or PDF. You can type the chart name and choose a publish to location and immediately publish a chart.

Advanced Mode walks you through each of the wizard dialogs, enabling extensive choices for publishing format, enabling the publishing notification email, selecting planning or succession chart options, end users toolbar and button options, end user context menu commands, allowing end user personalization, enabling visually impaired support, chart security, and more.

Publishing in PluginX Format

1. Click the Publish button 

in the toolbar. You can also select **Tools** from the Main menu then **Publishing Wizard** from the options list. If this is the first time you are publishing a chart, the wizard opens to the first dialog which gives you a brief overview of the *Publishing Wizard*. Click **Next**.

2. If your published chart does not require specific selections, select the **Express Mode** radio button and follow the Publishing in Express Mode procedure.

   If your published chart requires selections, such as planning or available toolbars, select the **Advanced Mode** radio button. Click **Next** and click **Next** again.

3. Type the **Name** of the published chart. It can be the same as the chart name and does not need to include publishing information. The name must, however, be unique and cannot contain any special characters such as slashes (**** or **/**), colons (**:**), asterisks (*****), question marks (**?**), quotation marks (**"**), and greater than or less than symbols (**<** or **>**). The publishing definition name can be up to 255 characters. Click **Next**.

4. Accept the default **Interactive Org Chart** selection. Click **Next**.

5. Accept the default **PluginX** selection. Click **Next**.

6. Type or **Browse** to the location where you want to publish your org chart.

7. The **Overwrite existing HTML and JS files** check box in this dialog is selected by default. If you do not want to write over your existing htm information, click this check box to clear it.

8. Select the **Send to web server (FTP)** check box if you want to transfer your chart to your intranet. Click **Next**.

9. If you selected **Send to web server (FTP)**, the *FTP Server* dialog opens. Type the required information to publish the chart to your intranet.
   - **Enter the user name** - Type your system user name.
   - **Enter the password** - Type your password, if any to transfer files to your web server.
   - **Confirm password** - Retype the password.
   - **Address (FTP URL or server name)** - You must type the correct IP address or server name before you can click **Browse Site**. Once you enter the server name, the dialog displays a directory tree. Navigate to the directory you want and click on it. The **Parent Dir** button enables you to move up to the parent directory, if necessary.

   Double-click on the correct file. The complete URL address displays in the **Path** field. Click **Next**.

10. Select the **Chart Style** you want the published chart to display first by clicking the down-arrow and choosing a style from the options list.

11. If you have highlighted a box in the Chart View other than the hierarchical top box, you can select **Reset starting box** to make that box the top of your published chart. Click **Next**.

12. When you select the **Enable Publish Notification Email** check box, this notification can be sent and the chart will not be published in the event of a:
   - **Broken hierarchy**
   - **Recursive reporting relationship**
   - **License violation**

13. Type or scroll to select the email address to which the notification should be sent in the **Addresses** field.

14. Type the email address from which the notification should be sent in the **From Address** field.

15. Type the name of your company's **Mail Server**.

16. The **Port** field defaults but can be overridden only on the rare occurrence that it is not the standard port.

17. You can click **Send Test Email** to verify that the email addresses you entered are correct. Click **Next**.

Note: *This notification is sent only if the OrgPublisher is not being run interactively.*

18. Select a color scheme for the published chart. Select the **Use a predefined color scheme** radio button if you want to use a predefined scheme.

Note: *This option is disabled if you are not running in at least 16 bit color. The Publishing Wizard color scheme option affects the published chart only.*

19. Click the down-arrow and select one of the schemes from the options list. The color scheme displays in the **Preview** pane of the dialog. If the scheme is what you want, click **Next**. If the scheme is not what you want, select a different predefined scheme or select a custom color scheme.

20. Select the **Use a custom color scheme** radio button if you want to choose the colors for your published chart.

21. Click **Define custom color scheme**. The *Select Color Scheme* dialog opens. See the Selecting Color Schemes for Published Charts procedure in this document for details. Click **Next**.

22. Select the toolbars, buttons, and views you want to display in your published chart. End users can utilize buttons on these toolbars to view more of the chart data and to navigate through it.

    You can enable the **Main** and **Views** toolbars and enable either only certain buttons or all buttons on each toolbar.

23. If you do not enable the **Copy** button in the **Main** toolbar, you can select the **Enable PluginX copy** check box if you want to allow your end users to copy the browser window and chart to other applications.

24. Select **Enable opening the search results in Microsoft Excel** if you want end users to click (open in Excel) in the Search View and OrgPublisher opens Microsoft Excel with the search results list displaying. Click **Next**.

25. With OrgPublisher Premier, you can select the **Enable Organizational Planning** and/or **Enable Succession Planning** check boxes if you want to enable web-based planning. Click **Next**.

26. If you selected the planning option, you can select the **Enable revision history** check box if you want the planning charts to provide a history of revisions, user ID, and, if available, comments.

27. Select the **Require that all planning charts be password protected** check box if you want to limit access to the planning charts.

28. If you want an indicator in the planning chart when changes are made, select the **Show visual indicator for changes** check box.

29. Click **Set default options for change report** if you want to modify the information provided in the planning chart change report. See the Setting Change Report Default Options procedure in this document for detailed information. Click **Next**.

30. Click on the plus sign to expand the context menu commands (chart action buttons) for the published chart. Click an item to turn it off or on. The default to all options are enabled. A green check indicates an option is enabled, a red X that the option is disabled. Click **Next**.

31. If you are publishing your chart using a different "top of chart " than the actual top box in the chart, you can select the **Exclude positions above** check box if you do not want your end users to drill up in the chart.

32. Select the **Create directory view for chart** check box if you want to publish an additional HTML file of the chart that contains only the Search View columns. See the Publishing a Directory Version of the Chart procedure in this document for detailed information.

33. If you want to allow the PluginX chart to be personalized by the end user, select the **Remember each user's navigation and interface changes** check box is selected.

34. Select either the **Open hotspots in the same browser window** or the **Open hotspots in a new browser window** radio button based on how you want end users to access the chart's hotspots.

35. You can choose to use your own PluginX help for your published chart by typing the file name and location in the **PluginX Help URL** field which users can access by clicking the question mark in the OrgPublisher toolbar. Click **Next**.

36. In the next dialog you can also set the **Maximum number of email recipients** in Search View. The default is **20**, but you can change that, depending on your system.

37. If you want to publish your chart for accessibility by JAWS assistive software, select the **Enable support for the visually impaired** check box. Click **Next**.

38. You can encrypt the data of a PluginX chart and secure the chart by selecting the **Password protect this chart** check box. If you choose to password protect the chart, continue with the options in this dialog. If not, click **Next** and proceed to Step 42.

39. In the **Password Protection Options** section, type the **Password**.

40. Select either **40 bit encryption** or **128 bit encryption**. This choice requires that the end user PCs have the Microsoft High Encryption Pack installed.

41. If you want PluginX to remember the password for end users, select the **Allow 'Remember my password' option in the PluginX** check box. Click **Next**.

42. If you want to set up an archive schedule now, select the **Keep an archive of this chart** check box.

43. Type or **Browse** to the location where you want to store the archives.

44. Select the interval at which you want the chart to archive, **Every time the chart is published**, **Weekly**, or **Monthly**. Click **Next**.

45. Select the radio button for when you want to publish.
    - **Publish now**: The chart is published and saved to the location you specified. The publishing definition is also saved for future use.
    - **Publish later**: This option opens the *Publish charts* dialog. The chart is not published, but the publishing definition is saved. See Using the Publish Charts Dialog section of this document.
    - **Schedule now**: This option opens the *Schedule Name* dialog. Follow the Creating a Publishing Scheduleprocedure.

    The *Publishing Summary* message displays the link, or links if you also chose to publish a directory view chart, to your published charts. Click on the link to preview the chart.

    Click **Finish**.

Publishing in EChart Rich Client Format

Rich client is an option of EChart publishing and uses the OrgPublisher PluginX for a more flexible end user experience. EChart publishing may affect other processes running on the server. You can also schedule your published chart to automatically publish at a specified date and time.

1. Click the Publish button  in the toolbar or the Publishing Wizard button  in the Wizard View. You can also select **Tools** from the Main menu then **Publishing Wizard** from the options list. If this is the first time you are publishing a chart, the wizard opens to the first dialog which gives you a brief overview.

2. Select the **Advanced Mode** radio button. Click **Next**. Click **Next** again at the brief description dialog.

3. Type the **Name** of the published chart. It can be the same as the chart name and does not need to include publishing information. The name must, however, be unique and cannot contain any special characters such as slashes (**** or **/**), colons (**:**), asterisks (*****), question marks (**?**), quotation marks (**"**), and greater than or less than symbols (**<** or **>**). The publishing definition name can be up to 255 characters. Click **Next**.

4. Accept the default **Interactive Org Chart** selection. Click **Next**.

5. Select the **EChart** radio button. Click **Next**.

6. The next dialog verifies that your chart will benefit from publishing an EChart. If the wizard determines that your chart will not benefit from this option, it is recommended that you click **Back** and select a different publishing format. If your chart will benefit using the EChart option, click **Next**.

7. In the **Publish to location**, type or **Browse** to the location where you want to publish your org chart.

8. The **Overwrite existing HTML and JS files** check box in this dialog is selected by default. If you do not want to write over your existing information, click this check box to clear it.

9. Select the **Send to web server (FTP)** check box if you want to transfer your chart to your intranet. Click **Next**.

10. If you selected **Send to web server (FTP)**, the *FTP Server* dialog opens. Type the required information to publish the chart to your intranet.
    - **Enter the user name** - Type your system user name.
    - **Enter the password** - Type your password, if any, to transfer files to your web server.
    - **Confirm password** - Retype the password.
    - **Address (FTP URL or server name)** - You must type the correct IP address or server name before you can click **Browse Site**. Once you

enter the server name, the dialog displays a directory tree. Navigate to the directory you want and click on it. The **Parent Dir** button enables you to move up to the parent directory, if necessary.

Double-click on the correct file. The complete URL address displays in the **Path** field. Click **Next**.

11. Choose the EChart option, **Rich client using PluginX** or **Both client options above**. Click **Next**.

12. Type the **URL (http://SiteName)** of the virtual directory on your web server. This is necessary to locate the EChart server for this chart.

Note: *You can modify the BAT file created through the Publishing Wizard to publish to a location other than the server. Doing this may increase publishing time if your chart is extremely large (200,000+ records) or if the server has limited resources.*

In Windows operating systems, the UNC name format is:

\\servername\sharename\path\filename

13. Select the **Maximum chart levels** to display in your published EChart. Click **Next**.

14. Select a level of security to assign to your published EChart. If you have already set security on your selected custom fields, proceed to make your security selections in this dialog. If you have not secured your custom fields, close the Publishing Wizardand open the *Custom Field Properties* dialog to secure fields.

    First, **Select a chart security option** radio button.

    – **Unsecured** - This radio button is the default selection and allows all users to view the entire chart and its contents.

Note: *If you choose not to secure ECharts, they can be accessed by any chart user, as well as any user who can access the server where the EChart resides.*

If you plan to use EChart security, verify that your custom fields are set for Security before you open the Publishing Wizard.

– **Windows NT® operating system authentication** - Select this radio button to allow only users who have Windows NT access and who are actually located in the chart to access the chart.

– **System user ID /box linkage** - Select this radio button if you want to give any user ID on the user machine access to the chart. This is not a secure setting. The chart will open at the user's box.

– **Chart**- Select this radio button to require users to type an ID and password to open and view the chart. This option can be used for single sign-on.

– **Reverse proxy** - Select this radio button when you can supply the user ID in HTTP header.

Note: *This option can be used with portals for single sign-on.*

15. If you selected **Chart** as your security option, select the **Password** field from the pull-down list where OrgPublisher can find your password information. This must be stored in an Input File Layout custom field record.

16. If you selected **Reverse proxy** as your security option, accept the **Variable** default of **USER_ID**, or type a new variable.

17. If applicable, select the **Passed as a cookie** radio button.

18. Select the **User ID** field using the down-arrow.

19. Choose the **Format of User ID** field, such as **User ID only**, **Domain\UserID**, or **domain.company.com /UserID**.

20. In the **Starting box in chart** section, select the radio button of the box from which the security check will begin.
    – **Top of chart** - Select this radio button to open the chart at the original top of chart box, displaying all levels in the chart.
    – **Supervisor's box** - Select this radio button to open the chart at the user's supervisor's box, displaying all levels from that point downward.
    – **User's box** - Select this radio button to open the chart at the user's box, displaying all levels from that point down.
    – **Box ID in this field** - Select this radio button to open the chart at a top of chart box other than the previous options. This unique ID must be stored in an Input File custom field record. Use the down-arrow to make your selection in the adjacent field.

21. The **Allow users to drill up from starting box** check box is the default selection, and allows users to navigate to levels above their box in the chart. Clear the check box if you do not want users to navigate above their own chart level. Click **Next**.

22. Select the **Chart Style** you want the published chart to display first by clicking on the down-arrow and choosing a style from the options list.

23. If you have highlighted a box in the Chart View other than the hierarchical top box, you can select **Reset starting box** to make that box the top of your published chart. Click **Next**.

24. If you select the **Enable Publish Notification Email** check box, this notification can be sent and the chart will not be published in the event of a:
    - **Broken hierarchy**
    - **Recursive reporting relationship**
    - **License violation**
25. Type or scroll to select the email address to which the notification should be sent in the **Addresses** field.
26. Type the email address from which the notification should be sent in the **From Address** field.
27. Type the name of your company's **Mail Server**.
28. The **Port** field defaults but can be overridden only on the rare occurrence that it is not the standard port.
29. You can click **Send Test Email** to verify that the email addresses you entered are correct. Click **Next**.

Note: *This notification is sent only if the OrgPublisher is not being run interactively.*

30. Select a color scheme for the published chart. Select the **Use a predefined color scheme** radio button if you want to use a predefined scheme.

Note: *This option is disabled if you are not running in at least 16 bit color. The Publishing Wizard color scheme option affects the published chart only.*

31. Click the down-arrow and select one of the schemes from the options list. The color scheme displays in the **Preview** pane of the dialog. If the scheme is what you want, click **Next**. If the scheme is not what you want, select a different predefined scheme or select a custom color scheme.
32. Select the **Use a custom color scheme** radio button if you want to choose the colors for your published chart.
33. Click **Define custom color scheme**. The *Select Color Scheme* dialog opens. See the Selecting Color Schemes for Published Charts procedure in this document for details. Click **Next**.
34. Select the toolbars and buttons you want to display in your published chart. You can make these selections "role-based" in a secured EChart. Open locks appear to the left of each securable button. Click the lock to display security options.

Right-click on the lock to display the available groups. Click to select individual groups or click on **(Select all groups)** to include all group results. After you select a group, the lock appears closed and the button displays a green filled check box indicating that it is available for the restricted viewing audience. Only users who are in the selected groups have access to the locked buttons when they access the published EChart.

35. If you do not enable the Copy button in the Main toolbar, you can select the **Enable PluginX copy** check box if you want to allow your end users to copy the browser window and chart to other applications. **Enable opening the search results in Microsoft Excel**, end users will be able to click the open in Excel button in the Search View and OrgPublisher opens Microsoft Excel with the search results list displaying. Click **Next**.

36. Select one or both of the planning options, **Enable Organizational Planning** and/or **Enable Succession Planning**, if you want to enable web-based planning in the published chart. Click **Next**.

37. If you selected one or both of the planning options, select the **Enable revision history** check box to provide a history of revisions, user ID, and, if available, comments.

38. Select the **Require that all planning charts be password protected** check box if you want to limit access to the planning charts.

39. If you want an indicator in the planning chart when changes are made, select the **Show visual indicator for changes** check box.

40. Click **Set default options for change report** if you want to modify the information provided in the planning chart change report. See the Setting Change Report Default Options procedure in this document for detailed information. Click **Next**.

41. If you are publishing a secured EChart, you can choose where to store your planning charts. You can **Store planning charts on the user's local hard drive**, and these charts can be shared with other users via email.

    Or, you can **Store planning charts centrally on the EChart server**. Each user will automatically have access to planning charts that exist at or below the user's section of the hierarchy.

42. Type the name of the folder on the server that will be used to store the planning charts. Click **Next**.

Note: *It is strongly recommended that this folder be secured so that it is accessible to the EChart server but not HTTP requests.*

43. Select the group name that will be allowed to create, view or modify planning charts only from a selected point in the chart.

44. Select the group name that will be allowed to create planning charts for the entire chart hierarchy. Click **Next**.

45. Click on the plus sign to expand the context menu commands (chart action buttons) for the published chart. Click an item to turn it off or on. The default to all options are enabled. A green check indicates an option is enabled, a red X that the option is disabled. Click **Next**.

46. If you are publishing your chart using a different "top of chart" than the actual top box in the chart, you can select the **Exclude positions above** check box if you do not want your end users to drill-up in the chart.

47. Select the **Create directory view for chart** check box if you want to publish an additional HTML file of the chart that contains only the Search View columns. See the Publishing a Directory Version of the Chart procedure in this document for detailed information.

48. If you want to allow the rich client chart to be personalized by the end user, select the **Remember each user's navigation and interface changes** check box.

49. Select either the **Open hotspots in the same browser window** or the **Open hotspots in a new browser window** radio button based on how you want end users to access the chart's hotspots.

50. You can choose to use your own PluginX help for your published chart by typing the file name and location in the **PluginX Help URL** field which users can access by clicking the question mark in the OrgPublisher toolbar. Click **Next**.

51. In this dialog you can set the **Maximum number of email recipients** in *Search View*. The default is 20, but you can change that, depending on your system.

52. If you want to publish your chart for accessibility by JAWS assistive software, select the **Enable support for the visually impaired** check box Click **Next**.

53. If you want to set up an archive schedule now, select the **Keep an archive of this chart** check box.

54. Type or **Browse** to the location where you want to store the archives.

55. Select the interval at which you want the chart to archive, **Every time the chart is published**, **Weekly**, or **Monthly**. Click **Next**.

56. Select the **Publish now** radio button to publish your EChart immediately. The *Publishing Summary* message displays the link, or links if you also chose to publish a directory view chart, to your published charts. Click on the link to preview the chart.

Note: *The EChart htm file must be closed in order to publish successfully. If it is open when you attempt to publish the EChart, an error message displays stating that access is denied. Simply close the file and publish again.*

57. Select **Publish later** to open the *Publish charts* dialog where all publishing definitions are kept. You can publish your EChart directly from this dialog or schedule your EChart to publish with Task Scheduler.

Note: *EChart publishing may affect other processes running on the server.*

Publish EChart Thin Client

OrgPublisher includes EChart thin client architecture that enables you to publish org charts from your server and run the charts remotely. The EChart thin client requires no install on end user machines and works in diverse environments. The EChart rich client, on the other hand, installs components to your end user's computer as required, but provides for a richer user interface solution. For example, end users can open a chart published via thin client that contains 12 levels and the default is to display 4 levels. OrgPublisher calls only the levels displayed currently in the browser, the default 4, rather than all 12 levels.

Note: *Thin client charts are platform independent, however browser compatibility problems between your operating system and your platform version may occur and, thus, affect thin client chart performance.*

OrgPublisher thin client charts are dynamic HTML versions of org charts. You can customize the HTML pages to more closely match the look and feel of your web site, as well as what information is displayed, by linking to your custom style sheet. Because there is no input type for tree control in HTML, the Tree View is not available in thin client charts. In addition, the *Search* feature is not be available in its entirety in thin client charts.

End users can access a modified Search View by clicking the List View  button in the toolbar.

The EChart thin client provides a Print  button which prints the chart to a PDF.

The thin client option is a form of EChart, however, there are some differences between the rich client mode and thin client mode in a published chart. The table below outlines these differences.

Feature	Rich client	Thin client
9 Box Matrix	Yes	Yes
Side-by-side profiles		
Workforce analysis graphs		
Role-based security		
Express publishing	No	No
Tabbed views		
Succession planning		
Chart design template	Yes	Yes
Maximized docked views	Yes	Yes
Chart legend	Yes	Yes
Hover Profile	Yes	Yes
Spotlight groups and search results	Yes	Yes
Real-time publishing	Yes	Yes
Multiple viewing levels	Yes	Yes
Displayable views	Yes	No *Tree View*; *Search View* does not have a separate List View as in PluginX
Resizable views	Yes	No
Show/hide views	Yes	Yes
Moveable (docked) views	Yes	No
Printable views (other than Chart View)	Yes	No
Drilling navigation	Yes	Yes
Hotspot links	Yes	Yes
Smart Links	Yes	Yes
Chart searches (toolbar, Search View, Search dialog)	Yes	Toolbar button opens *Search View*
Ad hoc/My groups queries	Yes	No
Group Editor dialog	Yes	No
Saved ah hoc/My groups queries	Yes	No
Email to a group	Yes	No
Quick search from toolbar	Yes	Yes

Feature	Rich client	Thin client
Status bar	Yes	Yes
Zoom factor/zoom to point	Yes	No
Copy option	Yes	Browser image copy
Copy query results to clipboard	Yes	Only the records actually seen in the window
Photos in chart	Yes	Yes
Selectable chart styles	Yes	Yes
Logo/watermark support	Yes	No
Print preview - Book or Wall style	Yes	In PDF viewer only
Print as book	Yes	PDF document
Print as wall chart	Yes	Browser print
Sexcurity validation (Active Diretory® authentication, ID/Box linkage)	Yes	Yes
Automatic/single sign-on security	Yes	Yes, using Active Directory authentication when running IIS with anonymous access disabled
Browser component required	Yes	No
Section 508 compatibility	Yes	No
Access to a UNC path for photo linkage	Yes	No
Viewable by Mac® computer and UNIX® operating system users	No	Yes, with JavaScript turned off
Support provided for the Apache httpd server	Yes	No

Publishing in EChart Thin Client Format

Note: *Logos are not supported when publishing as an EChart thin client.*

Due to several possible network issues, it is recommended that you hide all photos before publishing as thin client. See the Troubleshooting section for details.

The Levels field in the published Unifi Thin Client chart displays the lowest of the two options, "maximum number of levels set at publish time" and "maximum levels" set in the Unifi rich client application.

If your EChart contains secured fields, it is recommended that you either do not publish your chart in thin client format or that you do not use onditional formatting on secured fields.

Hierarchical custom field security can significantly slow the length of time to publish the thin client.

EChart thin client end users will not have the My groups tab available in the Search View.

The thin client is an option in EChart publishing. EChart publishing may affect other processes running on the server. Thin client publishing is a manual process and cannot be scheduled to automatically publish.

1. Click the Publish button 

in the toolbar or Publishing Wizard button  in the Wizard View. You can also select **Tools** from the Main menu then **Publishing Wizard** from the options list. The Publishing Wizard opens.

2. Select the **Advanced Mode** radio button. Click **Next**. Click **Next** again at the brief description dialog.

3. Type the **Name** of the published chart. It can be the same as the chart name and does not need to include publishing information. The name must, however, be unique and cannot contain any special characters such as slashes (**** or **/**), colons (**:**), asterisks (*****), question marks (**?**), quotation marks (**"**), and greater than or less than symbols (**<** or **>**). The publishing definition name can be up to 255 characters. Click **Next**.

4. Accept the default **Interactive Org Chart** selection. Click **Next**.

5. Select the **EChart** radio button. Click **Next**.

6. The next dialog verifies that your chart will benefit from publishing an EChart. If the wizard determines that your chart will not benefit from this option, it is recommended that you click **Back** and select a different publishing format. If your chart will benefit using the EChart option, click **Next**.

7. In the **Publish to location**, type or **Browse** to the location where you want to publish your org chart.

8. The **Overwrite existing HTML and JS files** check box in this dialog is selected by default. If you do not want to write over your existing information, click this check box to clear it.

9. Select the **Send to web server (FTP)** check box if you want to transfer your chart to your intranet. Click **Next**.

10. If you selected **Send to web server (FTP)**, the *FTP Server* dialog opens. Type the required information to publish the chart to your intranet.
   - **Enter the user name** - Type your system user name.
   - **Enter the password** - Type your password, if any to transfer files to your web server.
   - **Confirm password** - Retype the password.
   - **Address (FTP URL or server name)** - You must type the correct IP address or server name before you can click **Browse Site**. Once you enter the server name, the dialog displays a directory tree. Navigate to the directory you want and click on it. The **Parent Dir** button enables you to move up to the parent directory, if necessary.

     Double-click on the correct file. The complete URL address displays in the **Path** field. Click **Next**.

11. Choose the **EChart option Thin client**, or **Both client options above**. Click **Next**.

12. Type the URL **(http://SiteName)** of the virtual directory on your web server. This is necessary to locate the EChart server for this chart.

    In Windows operating systems, the UNC name format is:
    \\servername\sharename\path\filename

13. Select the **Maximum chart levels** to display in your published EChart. Click **Next**.

14. Select a level of security to assign to your published EChart. If you have already set security on your selected custom fields, proceed to make your security selections in this dialog. If you have not secured your custom fields, close the Publishing Wizard and open the *Custom Field Properties* dialog to secure fields.

    First, **Select a chart security option** radio button.
   - **Unsecured** - This radio button allows all users to view the entire chart and its contents. Not available in thin client format.

Note: *If you choose not to secure ECharts, they can be accessed by any chart user, as well as any user who can access the server where the EChart resides.*

If you plan to use EChart security, verify that your custom fields are set for Security before you open the Publishing Wizard.

   - **Windows NT® operating system authentication** - Select this radio button to allow only users who have Windows NT access and who are actually located in the chart to access the chart.
   - **System user ID /box linkage** - This radio button gives any user ID on the user machine access to the chart. This is not a secure setting

and is not available in thin client format. The chart will open at the user's box.

- **Chart** - Select this radio button to require users to type an ID and password to open and view the chart.
- **Reverse proxy** - Select this radio button when you can supply the user ID in HTTP header.

Note: *This option can be used with portals for single sign-on.*

15. If you selected **Unsecured**, click **Next** and proceed to Step 23.

    If you selected **Windows NT® operating system authentication**, proceed to Step 19.

    If you selected **System user ID /box linkage**, proceed to Step 19.

16. If you selected **Chart** as your security option, select the **Password** field from the pull-down list where OrgPublisher can find your password information. This must be stored in an Input File custom field record. Proceed to Step 20.

17. If you selected **Reverse proxy** as your security option, accept the **Variable** default of **USER_ID**, or type a new variable.

18. If applicable, select the **Passed as a cookie** check box.

19. Select the **User ID** field using the down-arrow.

20. Choose the **Format of User ID field**, such as **User ID only**, **Domain\UserID**, or **domain.company.com /UserID**.

21. Select a **Starting box in chart** from which the security check will begin.
    - **Top of chart** - Select this radio button to open the chart at the original top of chart box, displaying all levels in the chart.
    - **Supervisor's box** - Select this radio button to open the chart at the user's supervisor's box, displaying all levels from that point downward.
    - **User's box** - Select this radio button to open the chart at the user's box, displaying all levels from that point down.
    - **Box ID in this field** - Select this radio button to open the chart at a top of chart box other than the previous options. This unique ID must be stored in an Input File Layout custom field record. In the adjacent field, click the down-arrow to select the custom field you want to use.

22. The **Allow users to drill up from starting box** check box is the default selection, and allows users to navigate to levels above their box in the chart. Clear the check box if you do not want users to navigate above their own chart level. Click **Next**.

23. Select the **Chart Style** you want the published chart to display first by clicking the down-arrow and choosing a style from the options list.

24. If you have highlighted a box in the Chart View other than the hierarchical top box, you can select **Reset starting box** to make that box the top of your published chart. Click **Next**.

25. If you select the **Enable Publish Notification Email** check box, this notification can be sent and the chart will not be published in the event of a:
    - **Broken hierarchy**
    - **Recursive reporting relationship**
    - **License violation**

26. Type or scroll to select the email address to which the notification should be sent in the **Addresses** field.

27. Type the email address from which the notification should be sent in the **From Address** field.

28. Type the name of your company's **Mail Server**.

29. The **Port** field defaults but can be overridden only on the rare occurrence that it is not the standard port.

30. You can click **Send Test Email** to verify that the email addresses you entered are correct. Click **Next**.

Note: *This notification is sent only if the OrgPublisher is not being run interactively.*

31. Select a color scheme for the published chart. Select the **Use a predefined color scheme** radio button if you want to use a predefined scheme.

Note: *This option is disabled if you are not running in at least 16 bit color. The Publishing Wizard color scheme option affects the published chart only.*

32. Click the down-arrow and select one of the schemes from the options list. The color scheme displays in the **Preview** pane of the dialog. If the scheme is what you want, click **Next**. If the scheme is not what you want, select a different predefined scheme or select a custom color scheme.

33. Select the **Use a custom color scheme** radio button if you want to choose the colors for your published chart.

34. Click **Define custom color scheme**. The *Select Color Scheme* dialog opens. See the Selecting Color Schemes for Published Charts procedure in this document for details. Click **Next**.

35. Select the toolbars and buttons you want to display in your published chart. Specific button are not available in thin client charts. They are disabled and noted with an asterisk. **Enable opening the search results in Microsoft Excel**, end users will be able to click the open in Excel button in the Search View and OrgPublisher opens Microsoft Excel with the search results list displaying. Click **Next**.

36. If you are publishing your chart using a different "top of chart" than the actual top box in the chart, you can select the **Exclude positions above** check box if you do not want your end users to drill up in the chart.

37. Select the **Create directory view for chart** check box if you want to publish an additional HTML file of the chart that contains only the *Search View* columns. See the **Publishing a Directory Version of the Chart** procedure in this document for detailed information.

38. If you want to allow the thin client chart to be personalized by end user, select the **Remember each user's navigation and interface changes** check box.

39. Select either the **Open hotspots in the same browser window** or the **Open hotspots in a new browser window** radio button based on how you want end users to access the chart's hotspots.

40. You can choose to use your own published chart help by typing the file name and location in the **PluginX Help URL** field which end users can access by clicking the Help button 

in the OrgPublisher toolbar. Click **Next**.

41. The next dialog contains several default selections, which you may override by clearing the options.
    - **Enable JavaScript** allows end users to close views and do more specific searches.
    - **Enable end users to print charts via PDF files** will allow end users to print the thin client chart.

42. In the **Chart Graphic Options** section, **JPEG** is the default selection. If, however, your chart does not contain photos, gradients or backgrounds, you may want to select the **GIF** radio button for better text quality.

43. Select the **Use optimized toolbar and button images** check box if you cache static images.

44. If you want to use a custom style sheet for this chart, type the URL for the style sheet. Click **Next**.

45. Select the **Publish now** radio button to publish your EChart immediately. Click **Finish**.

Note: *The EChart htm file must be closed in order to publish successfully. If it is open when you attempt to publish the EChart, an error message displays stating that access is denied. Simply close the file and publish again.*

46. If you want to set up an archive schedule now, select the **Keep an archive of this chart** check box.

47. Type or **Browse** to the location where you want to store the archives.

48. Select the interval at which you want the chart to archive, **Every time the chart is published**, **Weekly**, or **Monthly**. Click **Next**.

49. Select the **Publish now** radio button to publish your EChart immediately. The *Publishing Summary* message displays the link, or links if you also chose to publish a directory view chart, to your published charts. Click on the link to preview the chart.

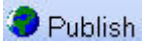
50. Select **Publish later** to open the *Publish charts* dialog where all publishing definitions are kept. You can publish your EChart directly from this dialog or schedule your EChart to publish with Task Scheduler.

    The **Publishing Summary** message displays the link, or links if you also chose to publish a directory view chart, to your published charts. Click on the link to preview the chart.

Publishing in Graphic Format

Note: *A chart published as a graphic is in JPG format, which can be read by most browsers and graphics programs.*

You can also schedule your published chart to automatically publish at a specified date and time.

1. Click the Publish button 

in the toolbar. You can also select **Tools** from the Main menu then **Publishing Wizard** from the options list. The Publishing Wizard opens.

2. Select the **Advanced Mode** radio button. Click **Next**. Click **Next** again at the brief description dialog.

3. Type the **Name** of the published chart. It can be the same as the chart name and does not need to include publishing information. The name must, however, be unique and cannot contain any special characters such as slashes (**** or **/**), colons (**:**), asterisks (*****), question marks (**?**), quotation marks (**"**), and greater than or less than symbols (**<** or **>**). The publishing definition name can be up to 255 characters. Click **Next**.

4. Select the **Org Chart Document** radio button. Click **Next**.

5. Select the **Graphic** radio button. Click **Next**.

6. Type or **Browse** to the location where you want to publish your org chart.

7. Select the **Send to web server (FTP)** check box if you want to transfer your chart to your intranet. Click **Next**.

8. If you selected **Send to web server (FTP)**, the *FTP Server* dialog displays. Type the required information to publish the chart to your intranet.
   - **Enter the user name** - Type your system user name.
   - **Enter the password** - Type your password, if any to transfer files to your web server.
   - **Confirm password** - Retype the password.
   - **Address (FTP URL or server name)** - You must type the correct IP address or server name before you can click **Browse Site**. Once you enter the server name, the dialog displays a directory tree. Navigate to the directory you want and click on it. The **Parent Dir** button enables you to move up to the parent directory, if necessary.

   Double-click on the correct file. The complete URL address displays in the **Path** field. Click **Next**.

9. Select the **Chart Style** you want the published chart to display first by clicking the down-arrow and choosing a style from the options list.

10. If you have highlighted a box in the Chart View other than the hierarchical top box, you can select **Reset starting box** to make that box the top of your published chart. Click **Next**.

11. If applicable, select the **Enable Publish Notification Email** check box, this notification can be sent and the chart will not be published in the event of a:
    - **Broken hierarchy**
    - **Recursive reporting relationship**
    - **License violation**

12. Type or scroll to select the email address to which the notification should be sent in the **Addresses** field.

13. Type the email address from which the notification should be sent in the From **Address field**.

14. Type the name of your company's **Mail Server**.

15. The **Port** field defaults but can be overridden only on the rare occurrence that it is not the standard port.

16. You can click **Send Test Email** to verify that the email addresses you entered are correct. Click **Next**.

Note: *This notification is sent only if the OrgPublisher is not being run interactively.*

17. Select the radio button for when you want to publish.
    - **Publish now**: The chart is published and saved to the location you specified. The publishing definition is also saved for future use. A copy of the chart as the user will see it is displayed on your browser. A *Publishing Summary* message displays a link to the published chart.
    - **Publish later**: This option opens the *Publish charts* dialog. The chart is not published, but the publishing definition is saved. See Using the Publish Charts Dialog section of this document.
    - **Schedule now**: This option opens the *Schedule Name* dialog. Follow the Creating a Publishing Schedule procedure.

    Click **Finish**.

Publishing in HTML Format

You can also schedule your published chart to automatically publish at a specified date and time.

1. Click the Publish button 

in the toolbar. You can also select **Tools** from the Main menu then **Publishing Wizard** from the options list. If this is the first time you are publishing a chart, the wizard opens to the first dialog which gives you a brief overview of the Publishing Wizard. Click **Next**.

2. Select the **Advanced Mode** radio button. Click **Next**. Click **Next** again at the brief description dialog.

3. Type the **Name** of the published chart. It can be the same as the chart name and does not need to include publishing information. The name must, however, be unique and cannot contain any special characters such as slashes (**** or **/**), colons (**:**), asterisks (*****),

question marks (**?**), quotation marks (**"**), and greater than or less than symbols (**<** or **>**). The publishing definition name can be up to 255 characters. Click **Next**.

4. Select the **Org Chart Document** radio button. Click **Next**.
5. Select the **HTML** radio button. Click **Next**.
6. Type or **Browse** to the location where you want to publish your org chart.
7. Select the **Send to web server (FTP)** check box if you want to transfer your chart to your intranet. Click **Next**.

If you selected **Send to web server (FTP)**, the *FTP Server* dialog displays. Type the required information to publish the chart to your intranet.

- **Enter the user name** - Type your system user name.
- **Enter the password** - Type your password, if any to transfer files to your web server.
- **Confirm password** - Retype the password.
- **Address (FTP URL or server name)** - You must type the correct IP address or server name before you can click **Browse Site**. Once you enter the server name, the dialog displays a directory tree. Navigate to the directory you want and click on it. The **Parent Dir** button enables you to move up to the parent directory, if necessary.

  Double-click on the correct file. The complete URL address displays in the **Path** field. Click **Next**.

8. Select the **Chart Style** you want the published chart to display first by clicking the down-arrow and choosing a style from the options list.
9. If you have highlighted a box in the Chart View other than the hierarchical top box, you can select **Reset starting box** to make that box the top of your published chart. Click **Next**.
10. When you select the **Enable Publish Notification Email** check box, this notification can be sent and the chart will not be published in the event of a:
    - **Broken hierarchy**
    - **Recursive reporting relationship**
    - **License violation**
11. Type or scroll to select the email address to which the notification should be sent in the **Addresses** field.
12. Type the email address from which the notification should be sent in the **From Address** field.

13. Type the name of your company's **Mail Server**.

14. The **Port** field defaults but can be overridden only on the rare occurrence that it is not the standard port.

15. You can click **Send Test Email** to verify that the email addresses you entered are correct. Click **Next**.

Note: *This notification is sent only if the OrgPublisher is not being run interactively.*

16. The **Enable Drill-up/Drill-down** check box is automatically selected and generates multiple HTML pages. If you do not want your end users to have the ability to navigate any where in the chart, clear this check box.

17. If you have included photos in your chart, it is recommended that you select the **Use JPEG graphic format** check box. Click **Next**.

18. Select the radio button for when you want to publish.
    - **Publish now**: The chart is published and saved to the location you specified. The publishing definition is also saved for future use. A copy of the chart as the user will see it is displayed on your browser. A *Publishing Summary* message displays a link to the published chart.
    - **Publish later**: This option opens the *Publish charts* dialog. The chart is not published, but the publishing definition is saved. See Using the Publish Charts Dialog section of this document.
    - **Schedule now**: This option opens the *Schedule Name* dialog. Follow the Creating a Publishing Schedule procedure.

    Click **Finish**.

Publishing in PDF Format

You can publish your chart as a PDF (Portable Document Format) in Book Style. This format produces a legend page listing the records in your chart as well as your Book Style chart.

Note: *When working with published chart in PDF format, end users must use Adobe® Reader® 9 to effectively open email links. OrgPublisher will install this free reader if it cannot find it on the end user's operating system.*

1. Click the Publish button 

in the toolbar. You can also select **Tools** from the Main menu then **Publishing Wizard** from the options list. If this is the first time you are publishing a chart, the wizard opens to the first dialog which gives you a brief overview of the Publishing Wizard. Click **Next**.

2. Select the **Advanced Mode** radio button. Click **Next**. Click **Next** again at the brief description dialog.

3. Type the **Name** of the published chart. It can be the same as the chart name and does not need to include publishing information. The name must, however, be unique and cannot contain any special characters such as slashes (**** or **/**), colons (**:**), asterisks (*****), question marks (**?**), quotation marks (**"**), and greater than or less than symbols (**<** or **>**). The publishing definition name can be up to 255 characters. Click **Next**.

4. Select the **Org Chart Document** radio button. Click **Next**.

5. Select the **PDF** radio button. Click **Next**.

6. Type or **Browse** to the location where you want to publish your org chart.

7. Select the **Send to web server (FTP)** check box if you want to transfer your chart to your intranet. Click **Next**.

8. If you selected **Send to web server (FTP)**, the *FTP Server* dialog displays. Type the required information to publish the chart to your intranet.
   - **Type user name** - Type your system user name.
   - **Type password** - Type your password, if any to transfer files to your web server.
   - **Confirm password** - Retype the password.
   - **Address (FTP URL or server name)** - You must type the correct IP address or server name before you can click **Browse Site**. Once you enter the server name, the dialog displays a directory tree. Navigate to the directory you want and click on it. The **Parent Dir** button enables you to move up to the parent directory, if necessary.

     Double-click on the correct file. The complete URL address displays in the **Path** field. Click **Next**.

9. Select the **Chart Style** you want the published chart to display first by clicking the down-arrow and choosing a style from the options list.

10. If you have highlighted a box in the Chart View other than the hierarchical top box, you can select **Reset starting box** to make that box the top of your published chart. Click **Next**.

11. When you select the **Enable Publish Notification Email** check box, this notification can be sent and the chart will not publish in the event of a:
    - **Broken hierarchy**
    - **Recursive reporting relationship**

– **License violation**

12. Type or scroll to select the email address to which the notification should be sent in the **Addresses** field.

13. Type the email address from which the notification should be sent in the **From Address** field.

14. Type the name of your company's **Mail Server**.

15. The **Port** field defaults but can be overridden only on the rare occurrence that it is not the standard port.

16. You can click **Send Test Email** to verify that the email addresses you entered are correct. Click **Next**.

Note: *This notification is sent only if the OrgPublisher is not being run interactively.*

17. In the *Settings* dialog, click **Next** if you want to accept the default settings for printing the PDF (both online display and hard copy), and proceed to Step 22. If you don't want to accept the defaults, proceed to Step 17.

18. Select the **Use classic book style printing** radio button if you want to print the PDF pages using chart layout 4. Or select the **Use the page optimizer** if you want to manually set PDF page options.

19. See the *Choosing PDF Settings* procedure in this document for detailed information about your choices of **Use easy settings**, **Preferred layout**, **Use custom optimizer settings**, **Page customization list**, and the **Depth** options. Additional information about the **Custom settings** and using the *Advanced Page Optimizer Settings* dialog can be found in the Modifying Book Style Print Settings or the Printing Your Chart as a Book procedure in this document.

20. In the **Boxes across on book style pages** section, select the **Automatically set row size** radio button to let OrgPublisher set the number of boxes per row and size these boxes to fit each page. Or, you can select the **Specify maximum row size** radio button to manually set the maximum number of boxes to print in a row. The minimum number of boxes across is 4. (The chart style is automatically stacked, which means there are two levels of the organization per page and the lowest level is arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level.)

21. In the **Organizational levels to print** field, click the down-arrow and select the number of levels you want to allow end users to print.

22. The check boxes in the lower section of this dialog concern **Print Index**, **Show page numbers in circles**, **Include Legend**, **Print Header**, **Print Footer**, and **Hyperlinks**. The Choosing Book Style Print Settings procedure provides additional information in these selections.

23. Click **Next** to leave the *Settings* dialog.

24. OrgPublisher provides default PDF paper settings for **Paper Size**, **Paper Orientation**, and **Margins**. You can accept the defaults or select the settings you want. Click **Next**.

25. The *Choosing Book Style Settings* procedure provides additional information in these selections. OrgPublisher defaults the **Font Embedding** check box which will increase the compatibility of the PDF file. If you have concerns about the size of the file (font embedding significantly increases the file size) you can clear the option.

26. The **Printer Resolution** is set to "600 DPI." You can choose a different DPI by clicking the down-arrow and selecting a DPI from the options list.

    The **Image Options** section also includes default selections. If you accept the defaults, OrgPublisher will **Remove Duplicate Images** and **Down-sample high resolution images** when creating the PDF file.

    If you are not concerned about the sharpness of graphics in your PDF chart, you can select the **JPEG Compression** check box which will help reduce the size of the file but provide a low quality graphic. Click **Next**.

27. Select the radio button for when you want to publish.

    – **Publish now**: The chart is published and saved to the location you specified. The publishing definition is also saved for future use. A copy of the PDF file is displayed on your browser. A *Publishing Summary* message displays a link to the published chart.

    – **Publish later**: This option opens the *Publish charts* dialog. The chart is not published, but the publishing definition is saved. See Using the Publish Charts Dialog section of this document.

    – **Schedule now**: This option opens the *Schedule Name* dialog. Follow the Creating a Publishing Schedule procedure.

    Once you've published the chart, a dialog displays the progress of the PDF conversion. After the conversion is complete a message box displays the number of chart pages created.

    The PDF chart file is saved to the **WEB** folder in the OrgPublisher directory. End users will be able to view and print the chart as a "Book style" PDF.

Note: *The PDF book style printing is the only print option for an EChart thin client chart.*

Click **Finish**.

Publishing a Directory Version of the Chart

With OrgPublisher you can publish a chart for *Directory View*. This additional html file opens the Search View as a directory for the published PluginX or EChart rich client chart.

Note: *When you select a base group filter, you also limit the records displayed in the published directory view of the chart.*

Express Mode

1. Click the Publish button 

in the toolbar or the Publishing Wizard button  in the Wizard View. You can also select **Tools** from the Main menu then **Publishing Wizard** from the options list. The Publishing Wizard opens.
2. Select the **Express Mode** radio button. Click **Next**.
3. Select the **Chart with directory view** radio button.
4. Type the **Name of Chart**.
5. Type or **Browse** to the **Location** where you want to store the chart. Click **Finish** to publish the chart directory.

Advanced Mode

1. If you choose to publish using the **Advanced Mode**, select **Interactive Org Chart**.
2. Make your selection of either **PluginX** or **EChart** and follow the wizard dialogs until you reach the multiple subject dialog that includes the directory view option.
3. Select the **Create directory view for chart** check box.
4. Complete the *Publishing Wizard* and then open the published chart .
5. You can access the directory view by clicking on the file name in the *Publishing Summary* message, or add an underscore and "dir" (**_dir**) to your chart name in the **Address** field in your browser and press

ENTER, for example, **\Creative Print_Dir.htm**. If you are publishing to EChart thin client, the name is **\Creative Print_TDir.htm**. The directory view opens.

End users can click on a name and OrgPublisher displays the **Smart Links** options list. The end user selects the required link, such as **Email** or **Go to person in chart**. If there is no link provided, OrgPublisher automatically *opens to the person in the chart.*

End users can also use the Search View features, such as the **Groups** and **My groups** tab, as well as the email, save as, and viewing the list in Microsoft Excel options.

Publishing a Portion of a Chart

1. Open the chart you want to publish.
2. Place the mouse pointer on the box you want to be the top of the chart and click to select it and all the boxes below it.
3. Select **File** from the Main menu then **Publish** from the pull-down menu. You can also click the Publish button 

in the toolbar. The Publishing Wizard or *Publish charts* dialog opens.
4. Select **Advanced Mode**, and step through the wizard dialogs, selecting the options you want included in this publishing definition.
5. Be sure to select the option to **Exclude positions above** if you do not want to publish the higher levels of the org chart.
6. Select a publishing option and click **Finish** to publish your chart.

Publishing Real-Time Charts

Real-time publishing is an option when publishing an EChart, either rich client or thin client, that has been created using an ODBC connection. This option requires Microsoft Data Access Components (MDAC) 2.6 or higher, ASP.NET support on the web server, and must be published to a virtual directory. You can also configure real-time connections for a Unifi chart using the *Real-time Connection Configuration* dialog.

Note: *The EChart option supports Microsoft Internet Explorer and requires a Microsoft IIS or ISAPI-compliant server.*

EChart publishing may affect other processes running on the server.

Real-time charts must be secured via your IIS, not through the Publishing Wizard. The security dialog is not available when you publish a real-time chart.

Real-time publishing is not available when building a chart from multiple data sources.

1. Click the Publish button 

in the toolbar. You can also select **Tools** from the Main menu then **Publishing Wizard** from the options list. If this is the first time you are publishing a chart, the wizard opens to the first dialog which gives you a brief overview of the Publishing Wizard.
2. Select the **Advanced Mode** radio button. Click **Next**. Click **Next** again at the brief description dialog.
3. Type the **Name** of the published chart. It can be the same as the chart name and does not need to include publishing information. The name must, however, be unique and cannot contain any special characters such as slashes (**** or **/**), colons (**:**), asterisks (*****), question marks (**?**), quotation marks (**"**), and greater than or less than symbols (**<** or **>**). The publishing definition name can be up to 255 characters. Click **Next**.
4. Accept the default **Interactive Org Chart** selection. Click **Next**.
5. Select the **EChart** radio button. Click **Next**.
6. The next dialog verifies that your chart will benefit from publishing an EChart. Click **Next** and click **Next** again.
7. Type or **Browse** to the location where you want to publish your org chart.
8. The **Overwrite existing HTML and JS files** check box in this dialog is selected by default. If you do not want to write over your existing htm information, click this check box to clear it.
9. Select the **Send to web server (FTP)** check box if you want to transfer your chart to your intranet. Click **Next**.
10. If you selected **Send to web server (FTP)**, the *FTP Server* dialog opens. Type the required information to publish the chart to your intranet.
   - **Type user name** - Type your system user name.
   - **Type password** - Type your password, if any, to transfer files to your web server.

- **Confirm password** - Retype the password.
- **Address (FTP URL or server name)** - You must type the correct IP address or server name before you can click **Browse Site**. Once you enter the server name, the dialog displays a directory tree. Navigate to the directory you want and click on it. The **Parent Dir** button enables you to move up to the parent directory, if necessary.

  Double-click on the correct file. The complete URL address displays in the **Path** field. Click **Next**.

11. Choose one of the EChart options, **Rich client using PluginX**, **Thin client**, or **Both client options above**. Click **Next**. The *Publishing Wizard Real-time Data* dialog opens.

12. Select the **Use Real-Time Data** check box.

13. If you want to improve searching performance you can select the **Use static cached data for searching** check box. This performs all searches using a "snapshot" of the data as of publishing time only. If you do not select this option, end users will be able to search using real-time data.

14. Type the **OLE DB connect string** for the database and click **Next**.

    If you need help building the connect string, click **Connect String Builder**. The *Data Link Properties* dialog opens at the **Provider** tab. Follow the Microsoft operating system instructions to select a data provider, build a connection string, and choose a data source by clicking the **Help** button in this dialog.

Note: *When publishing to real-time using Oracle, you MUST select the Microsoft OLE DB Provider for Oracle driver.*

15. After you select a provider, click **Next**. The *Data Link Properties* dialog opens to the **Connection** tab. Options may vary, depending on the provider selected. However, you MUST select the **Allow saving password** check box. This allows the password to be saved in the connection string in order to open the chart. Click **Next**.

16. Type the URL (**http://SiteName**) of the virtual directory on your web server. This is necessary to locate the EChart server for this chart. In Windows operating systems, the UNC name format is:

    \\servername\sharename\path\filename

17. Select the **Maximum chart levels** to display in your published EChart. Click **Next**.

18. Select a level of security to assign to your published EChart. If you have already set security on your selected custom fields, proceed to make your security selections in this dialog. If you have not secured

your custom fields , close the Publishing Wizard and open the *Custom Field Properties* dialog to secure fields.

First, **Select a chart security option** radio button.

- **Unsecured** - This radio button is the default selection and allows all users to view the entire chart and its contents.
- **Windows NT® operating system authentication** - Select this radio button to allow only users who have Windows NT access and who are actually located in the chart to access the chart.
- **System user ID /box linkage** - Select this radio button if you want to give any user ID on the user machine access to the chart. This is not a secure setting. The chart will open at the user's box.
- **Chart**- Select this radio button to require users to type an ID and password to open and view the chart. This option can be used for single sign-on.
- **Reverse proxy** - Select this radio button when you can supply the user ID in HTTP header.

19. If you selected **Chart** as your security option, select the **Password** field from the pull-down list where OrgPublisher can find your password information. This must be stored in an Input File custom field record.

20. If you selected **Reverse proxy** as your security option, accept the **Variable** default of **USER_ID**, or type a new variable.

21. If applicable, select the **Passed as a cookie** radio button.

22. Select the **User ID** field using the down-arrow.

23. Choose the **Format of User ID** field, such as **User ID only**, **Domain\UserID**, or **domain.company.com /UserID**.

24. In the **Starting box in chart** section, select the radio button of the box from which the security check will begin.
    - **Top of chart** - Select this radio button to open the chart at the original top of chart box, displaying all levels in the chart.
    - **Supervisor's box** - Select this radio button to open the chart at the user's supervisor's box, displaying all levels from that point downward.
    - **User's box** - Select this radio button to open the chart at the user's box, displaying all levels from that point down.
    - **Box ID in this field** - Select this radio button to open the chart at a top of chart box other than the previous options. This unique ID must be stored in an Input File custom field record. Use the down-arrow to make your selection in the adjacent field.

25. The **Allow users to drill up from starting box** check box is the default selection, and allows users to navigate to levels above their

box in the chart. Clear the check box if you do not want users to navigate above their own chart level. Click **Next**.

26. Select the **Chart Style** you want the published chart to display first by clicking on the down-arrow and choosing a style from the options list.

27. If you have highlighted a box in the Chart View other than the hierarchical top box, you can select **Reset starting box** to make that box the top of your published chart. Click **Next**.

28. When you select the **Enable Publish Notification Email** check box, this notification can be sent and the chart will not be published in the event of a:
    - **Broken hierarchy**
    - **Recursive reporting relationship**
    - **License violation**

Note: *This notification is sent only if the OrgPublisher is not being run interactively.*

Click **Next**.

29. Select a color scheme for the published chart. Select the **Use a predefined color scheme** radio button if you want to use a predefined scheme. Click **Next**.

Note: *This option is disabled if you are not running in at least 16 bit color. The Publishing Wizard color scheme option affects the published chart only.*

30. Select the toolbars and buttons you want to display in your published chart. End users can utilize buttons on these toolbars to view more of the chart data and to navigate through it.

    You can enable the **Main** and **Views** toolbars and enable either only certain buttons or all buttons on each toolbar.

Note: *The Summary View is not available in published real-time charts.*

31. If you do not enable the **Copy** button in the Main toolbar, you can select the **Enable PluginX copy** check box if you want to allow your end users to copy the browser window and chart to other applications.

32. If you select **Enable opening the search results in Microsoft Excel**, end users will be able to click the open in Excel button  in the Search View and OrgPublisher opens Microsoft Excel with the search results list displaying. Click **Next**.

33. Select one or both of the planning options, **Enable Organizational Planning** and/or **Enable Succession Planning**, if you want to enable web-based planning in the published chart. Click **Next**.

34. Select the **Enable revision history** check box if you want the planning charts to provide a history of revisions, user ID, and, if available, comments.

35. Select the **Require that all planning charts be password protected** check box if you want to limit access to the planning charts.

36. If you want an indicator in the planning chart when changes are made, select the **Show visual indicator for changes** check box.

37. Click **Set default options for change report** if you want to modify the information provided in the planning chart change report. See the Setting Change Report Default Options procedure in this document for detailed information. Click **Next**.

38. If you are publishing a secured EChart, you can choose where to store your planning charts. You can **Store planning charts on the user's local hard drive**, and these charts can be shared with other users via email.

39. Or, you can **Store planning charts centrally on the EChart server**. Each user will automatically have access to planning charts that exist at or below the user's section of the hierarchy.

40. Type the name of the folder on the server that will be used to store the planning charts. Click **Next**.

Note: *It is strongly recommended that this folder be secured so that it is accessible to the EChart server but not HTTP requests.*

41. Click the down-arrow to select a group that will be allowed to create/view/modify planning charts only from a selected point in the chart.

42. Click the down-arrow to select a group name will be allowed to create planning charts for the entire chart hierarchy. Click **Next**.

43. Click on the plus sign to expand the context menu commands (chart action buttons) for the published chart. Click an item to turn it off or on. The default to all options are enabled. A green check indicates an option is enabled, a red X that the option is disabled. Click **Next**.

44. If you are publishing your chart using a different "top of chart" than the actual top box in the chart, you can select the **Exclude**

positions above check box if you do not want your end users to drill up in the chart.

45. Select the **Create directory view for chart** check box if you want to publish an additional HTML file of the chart that contains only the Search View columns. See the Publishing a Directory Version of the Chart procedure in this document for detailed information.

46. If you want to allow the rich client chart to be personalized by the end user, select the **Remember each user's navigation and interface changes** check box.

47. Select either the **Open hotspots in the same browser window** or the **Open hotspots in a new browser window** radio button based on how you want end users to access the chart's hotspots.

48. You can choose to use your own rich client help for your published chart by typing the file name and location in the URL for PluginX help file field which users can access by clicking the question mark 

in the OrgPublisher toolbar. Click **Next**.

49. In this dialog you can set the **Maximum number of email recipients** in *Search View*. The default is 20, but you can change that, depending on your system.

50. If you are publishing to rich client, and want to publish your chart for accessibility by JAWS assistive software, select the **Enable support for the visually impaired** check box. Click **Next**.

    If you are publishing to thin client, proceed to Step 51, if not, proceed to Step 54.

51. If you are publishing to thin client, the next dialog contains several default selections, which you may override by clearing the options. Enable JavaScript allows end users to close views and do more specific searches.

    Enable end users to print charts via PDF files will allow end users to print the thin client chart.

    In the **Chart Graphic Options** section, **JPEG** is the default selection. If, however, your chart does not contain photos, gradients, or backgrounds, you may want to select the **GIF** radio button for better text quality.

52. Select the **Use optimized toolbar and button images** check box if you cache static images.

53. If you want to use a custom style sheet for this chart, type the URL for the style sheet. Click **Next**.

54. If you want to set up an archive schedule now, select the **Keep an archive of this chart** check box.

55. Type or **Browse** to the location where you want to store the archives.

56. Select the interval at which you want the chart to archive, **Every time the chart is published**, **Weekly**, or **Monthly**. Click **Next**.

57. If you are publishing to thin client, the next dialog contains several default selections, which you may override by clearing the options. **Enable JavaScript** allows end users to close views and do more specific searches.

    Enable end users to print charts via PDF files will allow end users to print the thin client chart.

    In the **Chart Graphic Options** section, **JPEG** is the default selection. If, however, your chart does not contain photos, gradients, or backgrounds, you may want to select the **GIF** radio button for better text quality.

58. Select the **Use optimized toolbar and button images** check box if you cache static images.

59. If you want to use a custom style sheet for this chart, type the URL for the style sheet. Click **Next**.

60. Select the **Publish now** radio button to publish your EChart immediately.

    Select **Publish later** to open the *Publish charts* dialog where all publishing definitions are kept. You can publish your EChart directly from this dialog or schedule your EChart to publish with Task Scheduler.

    The *Publishing Summary* message displays the link, or links if you also chose to publish a directory view chart, to your published charts. Click on the link to preview the chart.

Redirecting a Published EChart

For security purposes, you can redirect a published EChart to an alternate data folder.

1. Create an INI file with the same name as the chart and include the chart path; for example:

[OrgPublisherEChart]

OCS_PATH="C:\secure_directory_path\secure_folder\OCS\File_name.OCS

2. Place the INI file in the default directory created by OrgPublisher.

3. Copy the DLL file, and any associated style sheets if publishing as thin client, to the secure directory.

Republishing Charts

Note: *If you previously published a chart with a version earlier than OrgPublisher 8, you may want to modify your publishing definition to take advantage of the new functions.*

If you are republishing an EChart originally published on a previous version of OrgPublisher, you must delete the EChart DLL file before republishing using Version 8 and later.

1. Select **File** from the Main menu, then **Publish** from the pull-down menu. You can also click the Publish button 

. The *Publish charts* dialog opens.
2. All of your publishing definitions are listed. Click the gray box to the left of the publishing definition you want to select.
3. Click **Publish** to republish the chart. The chart is published and you are prompted to preview it. Click **Yes** to preview the chart as it will be seen on the web. Otherwise, click **No**.
4. If you need to modify your chart before republishing, click **Update** to walk through the Publishing Wizard to republish.
5. Click **Publish All** to publish all of the publishing definitions for this chart. You cannot preview the charts if you select this option.

Republishing EChart Rich / Thin Client Charts

1. Select **File** from the Main menu then **Publish** from the pull-down menu. You can also click the Publish button 

. The *Publish charts* dialog opens.
2. All of your publishing definitions are listed. Click the gray box to the left of the publishing definition you want to select.
3. Click **Publish** to republish the chart. The chart is published and you are prompted to preview it. Click **Yes** to preview the chart as it will be seen on the web. Otherwise, click **No**.
4. If you need to modify your chart before republishing, click **Update** to walk through the Publishing Wizard to republish. Follow the dialog prompts, and click **Publish Now** on the last dialog.

5. OrgPublisher displays the *EChart Link Summary* message. Click on the link to update and republish your chart. (The **HTM** link is always created when you publish an EChart. The **DLL/Frame** link is created when you publish an EChart thin client .)

Note: *The links in the EChart Link Summary are valid only when publishing to a server. Clicking on the EChart link does not actually run the BAT file, although it performs in a similar manner. If you modify the BAT file itself, you must run it manually to execute the changes.*

6. If you click **OK** instead of on the link, you must run the BAT file manually.

   When you first publish an EChart using the Publishing Wizard, OrgPublisher puts all the related files onto your server and creates the BAT (batch) file.

   To manually republish an updated EChart, whether rich client or thin client format, run the EChart BAT file. The BAT file will:

   – unload the EChart from the server memory
   – publish the EChart files to the server (if not already done)
   – reload the EChart onto the server

Changing a Publishing Definition

You can modify an existing publishing definition using the Publish charts dialog.

1. Select **File** from the Main menu then **Publish** from the pull-down menu. You can also click the Publish button  in the toolbar. The *Publish charts* dialog displays at the **Publishing Definitions** tab.

2. The **Name** field lists the publishing definitions for this chart. Click the gray box to the left of the publishing definition to select the one you want to change.

3. Click **Update** to walk through the *Publishing Wizard* for this publishing definition, modifying the desired elements.

Note: *Publishing formats can not be changed within the Publish charts dialog. All publishing updates must be done within the Publishing Wizard.*

4. Select a publishing time and click **Finish**. The new options are saved in the existing publishing definition when you save the file.

Note: *If you installed the Web Administration mode of OrgPublisher, you cannot change a publishing definition. The publishing definition and name of charts published with Web Administration must be the same.*

Deleting a Publishing Definition

1. Open a previously published chart or a chart for which you have defined and saved a publishing definition.
2. Select **File** from the Main menu then **Publish** from the pull-down menu. You can also click the Publish button 

in the toolbar. The *Publish charts* dialog opens.
3. In the **Charts to Publish** field select the publishing definition to remove from the list.
4. Click **Delete**. The definition no longer exists.
5. Save the chart file.

Using the Publish Charts Dialog

Note: *If you installed the Web Administration mode of OrgPublisher, you cannot change a publishing definition. The publishing definition and name of charts published with Web Administration must be the same.*

Web servers do not allow clients to schedule tasks. The OrgPublisher Web Administration Server allows you to publish charts manually. You can, however, open the desktop OrgPublisher version and schedule the publishing definition in the Publish charts dialog using the Web Administration SourceCharts folder.

1. Log on the server as an administrator or power user.

2. Open the desktop OrgPublisher application. (If default install is used, it would be in c:/program files/orgpubx).

3. Open the chart (found in the SourceCharts folder).

4. Schedule the publishing definition in OrgPublisher using the Schedules tab.

Also, when you are publishing to ECharts, you must manually schedule the BAT file created in the first manual publishing. To do this, open the Task Scheduler on the server to add the .BAT job.

ECharts are an exception, and are not automatically published using the Publish charts dialog.

The Publish charts dialog is enabled after you have published a chart or created a publishing definition.

In the *Publish charts* dialog, you can review the list of publishing definitions, the publishing schedules, and the schedule status of your charts.

You can also create new definitions and schedules, or update or delete existing definitions and schedules. From the *Publish charts* dialog, you can publish one or all of your definitions and preview the chart before you actually publish it.

The *Publish charts* dialog contains three tabs.

Publishing Definitions tab
Schedules tab
Schedule Status tab

Publishing Definitions tab

The **Publishing Definitions** tab of the *Publish charts* dialog provides the same elements as the Publishing Wizard and is available as soon as you have created a definition or published a chart.

This tab displays information about your publishing definitions. Buttons enable you to create **New**, and **Update** or **Delete** existing publishing definitions. Buttons are also available to **Preview** your chart, **Publish** a chart definition or **Publish All** definitions and Browse for the publishing location you want.

Fields in the **Publishing Definitions** tab are:

Field	Definition
Name	The name you set up for the chart publishing definition.
Start at	The box title chosen to be the “top of chart ” for this published chart.
Style	The style selected for the published chart.
How to publish	The publishing format selected, such as PluginX.
FTP to Web Server	If the check box is selected, indicates that the published definition is sent to a web server via FTP.
Date published	The date the chart was last published with this definition.

Schedules tab

The **Schedules** tab of the *Publish charts* dialog provides a list of your publishing schedules and the last time the publishing schedule ran. The **Schedules** tab displays information about the schedules for your publishing definitions. Buttons enable you to create **New** and **Delete** or **Update** existing schedules.

Note: *Always verify that your chart has published as scheduled by checking the Last run date and time or the Status information on the Schedule Status tab.*

Fields in the **Schedules** tab are:

Field	Definition
Name	The name of the publishing schedule.
Publishing Definition	The name given to describe the publishing definition.
Schedule	The date and time the definition is scheduled to run.
Last run	The date and time the definition was last published.

Schedule Status tab

The **Schedule Status** tab of the *Publish charts* dialog provides a list of your publishing definitions and the status of each publishing run. The **View log** button enables you to open your current scheduling log in Notepad to review it.

Fields in the **Schedule Status** tab are:

Field	Definition
Publishing Schedule	The name describing the publishing schedule.
Status	This field describes the current status of the publishing schedule. If blank, the chart has not yet been published. Once a chart is published, the status reads “Publishing completed.” If a problem occurs during the publishing process, you may see “Access denied” or “Login failure.”

Securing Published Charts

Note: *If you choose not to secure ECharts, they can be accessed by any chart user, as well as any user who can access the server where the EChart resides.*

EChart security works only with an unbroken hierarchy. Orphans within a secured chart will disrupt all security controls.

If you plan to use EChart security, verify that your custom fields are set for Security before you open the Publishing Wizard.

When publishing a real-time chart, you must use IIS security. The Publishing Wizard security dialog is disabled for this option.

Active Directory authentication for EChart thin client will always require a manual entry of the user's password.

In order to ensure that your user level security is not circumvented, you must restrict all users from accessing or transferring the OCS file in the EChart publishing directory.

Securing a PluginX Chart

OrgPublisher contains a feature for charts published in the PluginX format by encrypting the chart and setting a password.

Note: *Password encryption provides basic security only. If you want to publish a chart with NT authentication or field level security, you should publish using the EChart format.*

1. Follow the dialogs in the Publishing Wizard or *Publish charts* dialog selecting the **PluginX** publishing format.
2. When the wizard displays the dialog with the password fields, select the **Password protect this chart** check box.
3. Type the password you want to use in the **Password** field.
4. If you want users to be able to access the chart without typing the password each time they open it, select the **Allow 'Remember my password' option in the PluginX** check box.
5. OrgPublisher uses the **40 bit encryption** by default. If your users have the Microsoft High Encryption Pack installed on their machines, you can select the **128 bit encryption** radio button.
6. Click **Next** and continue with the *Publishing Wizard*.

When the encrypted chart is accessed in PluginX, the *Enter Password* dialog opens. If the **Remember my password** option was selected when the chart was published, that check box also displays in the text box.

End users type the correct **Password** and click **Unlock** to open the chart.

Securing an EChart

OrgPublisher contains a security feature for ECharts that provides security at the chart and custom field levels. ***A unique user ID custom field record must be kept in the OrgPublisher Input File in order to secure ECharts.*** In addition, if the manual entry of a password will be required, you must also keep the password information in an Input File custom field record.

OrgPublisher uses the Windows NT® authentication to help secure a published chart. Authentication provides the knowledge of the location of each person in the chart, and a person must be charted in order to open a secured EChart. You can also secure styles to a group, which can enhance a secure rich client EChart.

The Publishing Wizardprovides the security chart level options and the *Custom Field Properties* dialog provides the field level security options. The List View, Profile View, Search View, and *Search* dialog all reflect the same authentication level. Commands, such as go to top of chart, display whole chart, and drill-up/drill-down buttons, all recognize the "top of chart" as the end user's supervisor box, and will not display chart information beyond that point.

There are three types of authentication.

- **Full Windows NT authentication** - the server automatically recognizes you by your Windows NT login and password and opens the OrgPublisher EChart at your box. If a user is dialing in and cannot be recognized automatically, the user will be prompted for a user ID and password.
- **Manual authentication** - the server prompts each user to enter a user ID and password in order to open the OrgPublisher EChart. This password is designated in the Input File Record and selected in the *Publishing Wizard* when activating this security type.
- **Private fields** - the server does not pass private field information into the OrgPublisher EChart for users not specified in the *Custom Field Properties* dialog **Security** option.

Setting EChart Security

1. Verify that you have stored the appropriate custom field records in your input file.
2. If you want to set field level security, open the *Custom Field Properties* dialog from the **Data** menu option, or by clicking on the Custom fields button in the toolbar. If you do not need field level security, proceed to Step 7.
3. Select a custom field to secure and click **Security**. The *Custom Field Security* dialog opens.
4. Accept the default selection to **Allow this field to be searchable**, or clear the check box if you do not want end users to search for the custom field in the published chart.
5. In the **Options for secure ECharts** section, select the radio button that best fits the user audience you want to have access to the field.
   - **Entire chart** - Select this radio button if you want the field displayed throughout the entire chart. This is the default option.
   - **User's box and subordinates** - Select this radio button if you want the field displayed only in the user's box and all boxes below it.
   - **User's subordinates only** - Select this radio button if you want the field displayed only in the boxes below the user's box.
6. Select the group, if applicable, that you want to have access to the secured field. Everyone is the default option. Fields display in the chart when both the user audience and group criteria are satisfied.
7. Click **OK** to return to the *Custom Field Properties* dialog. Click **OK** to accept the security and exit the *Custom Field Properties* dialog.
8. Open the Publishing Wizard by clicking **Tools** in the Main menu and **Publishing Wizard** from the options list, or click the Publishing button Publish in the toolbar.
9. Follow the prompts in the wizard dialogs. When you reach the security dialog, select a security level option. If you select to secure your chart using one of the following methods, users must be in the chart in order to open it.
   - Unsecured - This radio button is the default selection and allows all users to view the entire chart and its contents.
   - **Windows® NT® operating system authentication** - Select this radio button to allow only users who have Windows NT access and who are actually located in the chart to access the chart.

- **System user ID/box linkage** - Select this radio button if you want to give any user ID on the user machine access to the chart. This is not a secure setting. The chart will open at the user's box.
- **Chart** - Select this radio button to require users to manually type an ID and password to open and view the chart.
- **Reverse proxy** - Select this radio button to allow OrgPublisher to retrieve the user ID from the HTTP header variable and use it for authentication.

10. If you selected the **Chart** option, click the down-arrow in the **Password** field and select the field in the chart containing the password information. This must be stored in an Input File custom field record.

11. No matter which security option you choose, click the down-arrow in the **User ID** field and select the field in the chart that holds the unique user ID. Click the down-arrow in the **Format of User ID field** to select the user ID format. This information must be stored in an Input File custom field record.

12. In the **Starting box in chart** section, select the box where you want OrgPublisher to display as top of chart.
    - **Top of chart** - Select this radio button to open the chart at the original top of chart box, displaying all levels in the chart.
    - **Supervisor's box** - Select this radio button to open the chart at the user's supervisor's box, displaying all levels from that point downward.
    - **User's box** - Select this radio button to open the chart at the user's box, displaying all levels from that point down.
    - **Box ID in this field** - Select this radio button to open the chart at a top of chart box other than the previous options. Click the down-arrow in the adjacent field to select the field you want to use. This unique ID must be stored in an Input File Layout custom field record.

13. The **Allow users to drill up from starting box** check box is the default selection, and allows users to navigate to levels above their box in the chart. Clear the check box if you do not want users to navigate above their own chart level.

14. Complete the Publishing Wizard. When the published chart is opened, it reflects the security options you have selected.

Securing an EChart Custom Field

You can set security on EChart custom fields using the *Custom Field Properties* dialog. The Publishing Wizard also enables you to select security settings for ECharts.

Note: *All fields display in archived charts. When using OrgHistory to archive an EChart with secured custom fields, you may want to consider removing the data from those fields, as described in Creating a New Archive Chart.*

You can designate custom fields as not searchable in published charts. The fields are still visible in the chart but end users will not be able to search for them.

1. Select **Data** from the menu bar, then **Custom Field Properties** from the pull-down menu. You can also use the Custom fields  button in the toolbar. The *Custom Field Properties* dialog opens.
2. Position the cursor at the custom field you want to secure and click **Security**. The *Custom Field Security* dialog opens.
3. The **Allow this field to be searchable** check box is a default option. If you do not want end users to searching using this custom field, clear the check box.
4. Depending on where you want the security to start, based on the end user's place in the chart, select **Entire chart**, **User's box and subordinates**, or **User's subordinates only**.
5. If you want to secure fields based on a group, allowing only members of the selected group to view the field, click the down-arrow and choose a group. Accept the default of **Everyone** if you if all users are allowed to view the field.
6. If you want to secure fields so that they are only visible in the records of members of a selected group, click the down-arrow and choose a group. Accept the default of **Everyone** if you do not need this feature.
7. Click **OK** to return to the *Custom Field Properties* dialog. Click **Cancel** if you do not want to apply your changes to security. All security criteria must be met in order for the selected custom field to display in the chart.

Additional Publishing Tasks

Choosing EChart Thin Client Settings

When publishing your chart in EChart thin client, you can accept default settings, or select settings of your own when the Publishing Wizard reaches the next to the last dialog. EChart thin client settings help you publish a chart that will look good and work within your browser, but can also enable end users to print the chart.

Choices include enabling JavaScript, choosing JPEG or GIF graphics, using a cascading style sheet, enabling PDF printing, and optimizing images.

Settings	Descriptions
Enable JavaScript	Accept this default selection to allow end users to close and reopen views, as well as perform searches on numeric fields. Clearing this option prohibits end users from closing views and forces them to search using the **All fields** options.
Enable end users to print charts via PDF files	Accept this default selection to provide end users with a "book style " print option for the chart. Clearing this option forces end users to use the browser **Print** button in order to get a hard copy of the chart, which only prints what displays in the browser window.
JPEG	Accept the default selection of **JPEG** if your chart contains photos, background or box color gradients, or background images.
GIF	Selecting the **GIF** radio button will provide a published chart with clearer text quality, but will display lower quality photos and graphics.
Cascading Style Sheet	You can type a path to your corporate or custom cascading style sheet you want to use with this thin client chart.

Two cascading style sheets are available with the OrgPublisher installation, and can be found in the **css** subfolder of the **OrgPub9** folder.

Choosing PDF Font and Image Settings

When publishing your chart in PDF format or printing an EChart thin client chart, OrgPublisher defaults to several settings. These include chart, paper, font and image choices.

Font embedding and images can affect the size of the PDF file which, in turn, can affect the response time.

Settings	Description
Font Embedding	OrgPublisher defaults to the **Font Embedding** check box. Embedding fonts used in the creation of the chart into the published PDF ensures that the end user sees the chart text just as it is in the original chart. If you have concerns about the size of the file (font embedding significantly increases the file size) you can clear the option.
Printer Resolution	The default **Printer Resolution** is set to 600 DPI, but you can select another option from 72 DPI to 1200 DPI. DPI means dots of ink (or toner) printed per inch of full-color and gray-scale images. The higher the resolution, the more detailed the image.
Remove Duplicate Images	If you accept the default, OrgPublisher will **Remove Duplicate Images**. If you must keep duplicate images in the PDF chart, clear this check box.
Downsample high-resolution images	OrgPublisher defaults to **Downsample high-resolution images** when creating the PDF file. If you want to keep high-resolution images, clear this check box. High-resolution images provide sharper graphics but can also increase the file size or take a longer to display.
JPEG Compression	If you are concerned about the PDF file size and the sharpness of graphics in your PDF chart is not a high priority, you can select the **JPEG Compression** check box.

Once you've published the chart, a dialog displays the progress of the PDF conversion. After the conversion is complete a message displays the number of chart pages created.

Choosing PDF Paper Settings

When publishing your chart in PDF format or printing an EChart thin client chart, OrgPublisher defaults to several settings. These include chart, paper, font and image choices. You can choose several paper settings, such as paper size, page orientation, and page margins; but you can select other options.

Settings	Description
Paper Size	You can choose the paper size you want for the PDF chart. The default is **Letter 8 1/2 x 11 in**. You can select **Legal 8 1/2 x 14 in**, **A4 210 x 297 mm** (International/European paper size, roughly 8.27 x 11.69 in) or **A3 297 x 420 mm** (International/ European paper size, roughly 11.69 x 16.54 in).
Page Orientation	You can choose the page orientation that will best display your PDF chart. The default is **Landscape** but, depending on the layout selected, you can choose **Portrait**.
Margins (in tenths of millimeters)	You can choose the page margins (in tenths of millimeters) that will best display your PDF chart. The default margins are **Horizontal 60** and **Vertical 60**. Type over the numbers if you want to change them.

Once you've published the chart, a dialog displays the progress of the PDF conversion. After the conversion is complete a message box displays the number of chart pages created.

Configuring EChart Multiple User Selections

When publishing a secured EChart, there may be multiple occurrences of end user ID records; for instance, an employee reports directly to a manager, but also participates in a project team and, therefore, also has an indirect reporting relationship to the project leader. When this occurs, the end user can select which occurrence to use when opening the chart.

You can choose which fields the end user can see when making the user ID record selection.

1. Click **Options** in the Main menu then **EChart security options** from the options list. The *EChart Multiple Instance User Configuration* dialog opens.

2. Select the check box for each field you want the end user to see, such as **Name of user's manager**, **First name**, **Last name**, **Job Title**, and more.

3. When you have finished your selections, click **OK**. The dialog closes.

When opening an EChart, end users are shown the *Select User Instance* dialog to choose which instance to use when accessing the chart. The dialog states that the user ID is assigned to multiple records in the chart

and one of the displayed instances must be chosen to view the chart. The information you select to display helps them make the right decision.

Enabling and Disabling Functions in a Published Chart

If you publish your chart in the **PluginX** or **EChart** format, you can select to enable or disable certain end user functions in the published chart. These selections are made in the Publishing Wizardand can be updated. The EChart thin client mode does not contain all toolbar options. For instance, the toolbar copy and search features are not available.

If you are publishing a secured EChart, you can select role-base toolbar buttons based on groups.

In addition, in the PluginX or EChart publishing format, you can:

- Allow end users to access different styles and groups by enabling the Styles bar in the published chart. The default is to enable the Style bar.
- Display the Status Bar in the Chart View, which explains what the users are viewing. For instance, the position type of the person in the selected box and head counts. The default is to enable the Status bar.
- Enable specific functions from the Main toolbar such as searching, drilling, and print preview, or disable the entire toolbar by clearing that check box.

Note: *If you disable the Main toolbar, the OrgPlan and Succession Plan options are not available in the published chart.*

- Select specific views your end users can see, such as the 9 Box Matrix View, Profile View, List View, or Search View, or disable all but the Chart View by clearing the Views toolbar check box. Some views are disabled, depending on the publishing format selected. For instance, thin client publishing does not provide the Tree View, and real-time chart publishing does not provide the Summary View.
- Allow end users to save a published chart, or a portion of the chart, under a different name. Select the **Save as** check box in the *Publishing Wizard*.
- The default is to allow saving the published chart. Clear the check box if you do not want end users to save any part of the published chart.

- Allow end users to preview and copy the chart into Microsoft PowerPoint. The default is to enable that function.
- Allow end users to print the published chart. Select the **Print** check box in the Publishing Wizard.

  The default is to enable printing of a published chart. Clear the check box if you do not want end users to use OrgPublisher to print a published chart. They will still be able to use the browser print feature.

  If you are working with a published EChart, end users will be limited to the size of the chart they are able to print.
- Allow end users to copy the published chart. Select the **Enable PluginX Copy** check box in the *Publishing Wizard*. The default is not to allow any copies in the browser while the PluginX chart is open, unless a third party copy software is used.

  The default is not to enable this function. This makes the published chart unavailable for copying, although end users can use the browser copy and paste functions.
- Enable or disable the ability for end users to view search results in Microsoft Excel. The default is to enable this feature.

Note: *If you are working with a published EChart, end users will be limited to the size of the chart they are able to save.*

Enabling Publish Notification Email

You can enable the publish notification email when using the *Publishing Wizard*. This notification is sent and the chart is not published in the event of a:

- **Broken hierarchy (orphans)**
- **Recursive reporting relationship**
- **License violation (publishing continues normally)**

Note: *This email notification does not cover all possible situations that can affect publication of a chart. Always check that your chart has published successfully.*

This notification is sent only if OrgPublisher is not being run interactively.

1. Follow the *Publishing Wizard* until you reach the email notification dialog. Select the **Enable Publish Notification Email** check box. The fields in the dialog are enabled for entry.

2. Type or scroll to select the email address to which the notification should be sent in the **Addresses** field
3. Type the email address from which the notification should be sent in the **From Address** field.
4. Type the name of your company's **Mail Server**.
5. The **Port** field defaults but can be overridden only on the rare occurrence that it is not the standard port.
6. You can click **Send Test Email** to verify that the email addresses you entered are correct.
7. Click **Next**, and continue with the publishing procedure.

Note: *If you have enabled Messages in the Options menu, publishing will stop when an error is detected. If you do not want to stop publishing in the event of an error, a registry setting must be changed. Contact the Aquire Support Team for assistance.*

Moving Boxes in the Published Chart

If given permission to access specific boxes, end users can move the boxes in the published chart. The mouse move box feature changes only if the user has the necessary permissions to access the box.

1. Place the mouse cursor over the border of a box. The cursor changes into a four way arrow  .
2. Click the mouse, and drag the box from that point.
3. Release the mouse when you reach the new location for the box.

Moving Published Charts

When you publish charts, it is safest to publish them to the location on the network where users will access them, typically a web server.

1. If the publish location changes, modify the publishing definition, using the Publishing Wizard or the *Publish charts* dialog, to redirect updated charts to the new location.
2. The HTML publishing format creates more than one file at publication, so when you move or copy a published HTML chart, make certain to transfer all the files for the chart.

Opening a Password Protected PluginX Chart

In order to protect sensitive information, you can publish charts to your browser as password protected. End users must enter a valid password in order to view the chart.

1. The *Enter Password* dialog opens when you access a protected chart in your browser.
2. If you know the password to open the chart, type the password in the **Password** field.
3. If the **Remember my password** option displays and you want to open the protected file in the future without entering the password again, select this check box.
4. Click **Unlock** to open the chart.
5. If you do not have a password, click **Cancel** and contact the publisher of the chart you want to open.

Overwriting the Existing HTML and JS Files

The **Overwrite existing HTML and JS files** check box in the Publishing Wizard is selected by default. If you do not want to write over your existing htm or JS information, click this check box to clear it.

Note: *This option is not available when republishing an EChart.*

You do NOT want to overwrite your HTML or JS files if you have modified them, for example to display special web elements, or you will lose your modifications.

However, when you first use a new version of OrgPublisher, it is advisable to create new HTML and JS files and then make your modifications to the new file.

Providing Access to End User Help Pages

When you publish a chart using PluginX or EChart you can provide the URL to help pages you create or allow end users access to the Aquire end user help pages on our web site.

The *Publishing Wizard* includes a dialog in which you can type or browse to the location of help pages meant for end users of your published charts.

1. Click the Publish button  in the toolbar. You can also select **Tools** in the Main menu then **Publishing Wizard** from the options list. If this is the first time you are publishing a chart, the wizard opens to the first dialog which gives you a brief overview of the Publishing Wizard.

2. Follow the dialog prompts until you reach the dialog enabling you to select several different options, such as creating a directory view , opening hotspots in the same or a new browser, or entering a URL for the PluginX help file.

3. If you want end users to access pages on your intranet, type the location of the end user help files you want to use in the **If applicable, type a URL for a PluginX help file** field.

4. Complete the *Publishing Wizard* and publish your chart.

5. Open the published chart and click on the Help button  in the toolbar. The custom help files open in the web browser.

   If you do not type a custom URL, the Help button opens the default Aquire end user help page.

Resetting the Number of Levels Published

When publishing large charts you may receive the following message:

OrgPublisher is unable to continue publishing due to your current settings. Please try publishing only 2 levels with the drill-up/drill-down publishing option.

You can either reset the number of levels or change your display settings in the Windows **Control Panel** to resolve this problem. To reset the number of levels:

1. Select **View** from the Main menu then **Show Custom Levels** from the pull-down menu.

2. Change **Custom Levels** to **2** to correct the error. (Otherwise, you can reset the levels to the number you want published.) Levels can also easily be set from the **Set Chart Levels** field in the toolbar.

Resetting the Starting Box

You can use the reset starting box option in the Publishing Wizard if you have a publishing definition assigned to start at a box ID that no longer exists in the chart.

When republishing or updating a published chart, clicking this button changes the top of chart (boxid) saved in the publishing definition to the currently selected box or the top box shown in the *Chart View*.

1. Select a box in the chart that you want as the top of chart.
2. Follow the Publishing Wizard , using the **Advanced Mode** option, until you reach the dialog containing the **Reset starting box** button.
3. Click **Reset starting box**. A message verifies you want to the publishing definition's top of chart box. Click **Yes**. If you decide not to change the starting box, click **No**.
4. Complete the *Publishing Wizard*.

Selecting a User ID Instance

When opening a secured EChart, there may be multiple occurrences of end user ID records, for instance if they have more than one report-to in the chart. When this occurs, end users can select a user ID instance to use in the chart session. EChart security must be enabled for this feature to work.

1. Open the published secured EChart. The Select User Instance dialog opens. Fields displayed include **Reports to**, **First name**, **Last name**, **Job title**, **Box Title**, **Position type**, and **Reporting relationship** (direct or indirect).
2. Review the displayed fields and select your record for the current chart session.
3. If you are opening a rich client chart, click **OK** to close the dialog. The published EChart opens.

   If you are opening a thin client chart, the EChart opens when you click your selection.

Selecting Additional Publishing Features

In the *Publishing Wizard*, you can enable or disable many features in the PluginX or EChart published chart. Some of those features are:

- Choose to publish a chart starting from a box other than the top of the chart. Select the **Exclude positions above** check box in the Publishing Wizard. This publishes your chart starting from that selected box in your organization. The default is not to exclude the positions above the selected box. This makes the positions above that box in the chart available to the end users via the **Display Whole Chart** feature.
- Create an additional file to publish as a telephone directory by selecting the **Create a directory view for chart** check box. The default is not to select this option.
- OrgPublisher can remember where the user last was in the chart so that the next time the user opens the chart, it opens in the same place. In addition, OrgPublisher retains all interfaces changes made by the end user. You can enable this feature by selecting the **Remember each user's navigation and interface changes** check box.
- Hotspots can reuse the current browser window or **Open hotspots in a new browser window**. You can select the radio button that serves your needs best. The default is to **Open hotspots in the same browser window**.
- Provide a link to the downloaded OrgPublisher end user help file if you do not want end users to use the same file from the published chart, which accesses the Aquire web site. If you want to make this or one of your own local help files available to end users, type your URL in the **PluginX Help URL** field.

Selecting Chart Action Button Options

The chart administrator can select available Action button options for each data element within the chart box in a published chart. You can remove any or all of the items (eliminating the Action buttons) from the published chart and planning chart.

1. Select **File** from the Main menu then **Publish** from the pull-down menu. You can also click the Publish  button in the toolbar. The *Publishing Wizard* or *Publish charts* dialog opens.
2. Step through the wizard dialogs and select the options you want included in this publishing definition.
3. When you reach the dialog for the context menu, click an item to turn it off or on. The default to all options are enabled. A green check indicates an option is enabled, a red X that the option is disabled.

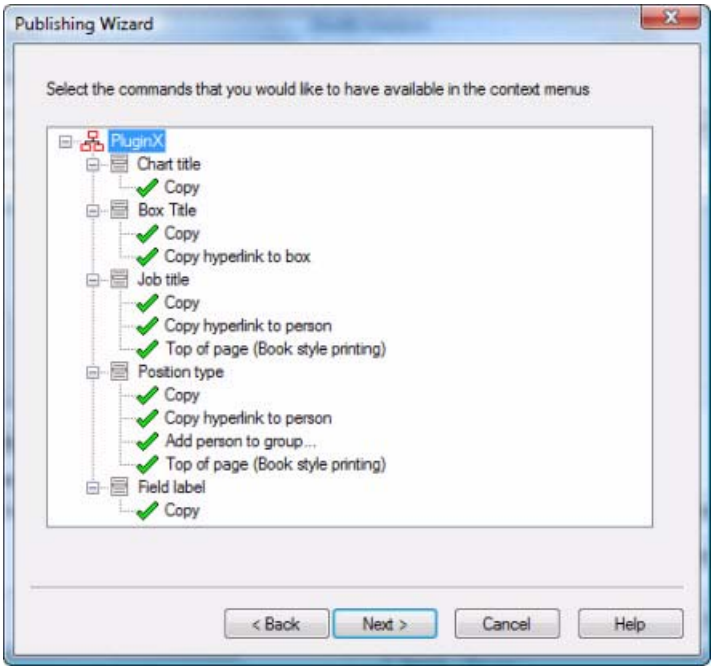


Figure 115

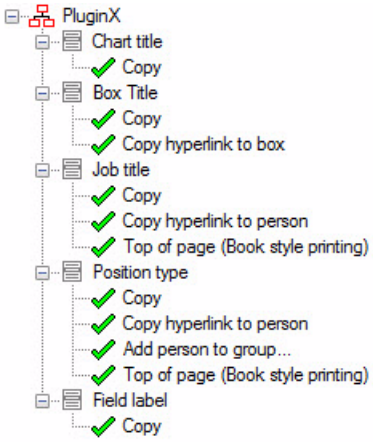


Figure 116

4. Click **Next** to complete the wizard to publish your chart.

   Planning chart options differ slightly but the procedure is the same.

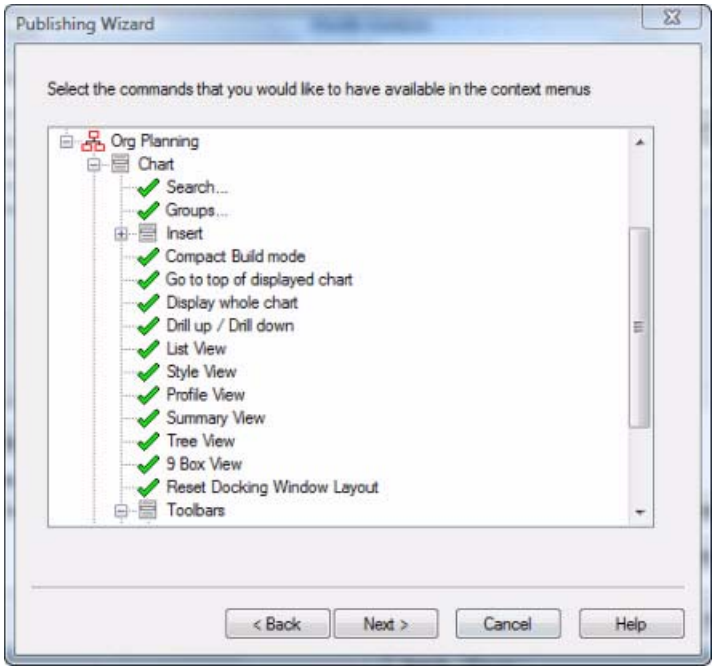


Figure 117

Selecting Color Schemes for Published Charts

You can select a color scheme for the published chart when using the Publishing Wizard. You can use the **Options** menu to change the color scheme for the chart in the OrgPublisher application.

Note: *This option is disabled if you are not running in at least 16-bit color.*

The Publishing Wizard color scheme option affects the published chart only.

1. Follow the *Publishing Wizard* until you reach the color scheme dialog. **Select the Use a predefined color scheme** radio button if you want to use a predefined scheme.

2. Click the down-arrow and select one of the schemes from the options list. The color scheme displays in the **Preview** pane of the dialog. If the scheme is what you want, click **Next**. If the scheme is not what you want, repeat steps 1-2 or proceed to step 3.

3. Select the **Use a custom color scheme** radio button if you want to choose the colors for your published chart.

4. Click **Define custom color scheme**. The *Select Color Scheme* dialog opens.
5. Select the color for each gradient by clicking the down-arrow to open the color grid. Fields in the OrgPublisher *Select Color Scheme* dialog include, background and gradient intensity, as well as a Style bar color option.
6. Select **Other** to define your custom color using the Microsoft® Windows Color dialog. Select the color by clicking in the color areas and using the intensity slide. Click **Add to Custom Colors**. Click **OK**.
7. You can also **Copy scheme to the clipboard** if you want to propagate the same color scheme to another chart. The code for the color scheme is copied to the clipboard which can be pasted into OrgPublisher.
8. Click **Paste scheme to the clipboard** if you want to paste the code previously copied to the clipboard into another OrgPublisher chart.
9. Click **OK** to close the dialog and return to the Publishing Wizard.
10. Click **Next** to go to the next dialog and complete the publishing process.

Selecting Publishing Options for the Tree View and List View

You can set display options for both the Tree View and List View from the Options menu. These options are only available for charts that are published with a PluginX format.

Note: *The Tree View is not available in a published thin client EChart.*

1. Select **Options** from the Main menu.
2. Click **Tree View options** then, from the options list, select or clear display options from a drop-down list:

Field	Description
Outline	Select this option to show box titles only.
Full	Select this option to show box titles, custom fields, and people.
Expand	Select this option to list all chart information for all levels shown.

Field	Description
Collapse	Select this option to show only box titles of the top two levels shown.
Show icons	Select this option to display chart icons.

3. Click **List View options** then select or clear the **Show Displayed Positions** check box. Select this check box to display a list of positions currently shown in the chart. Leave unchecked to display all positions,

   The Tree View reflects your choices.

Setting a Base URL (Path)

The base URL is the common path or command string for all hotspots or photos in the chart. To set up a base URL (path), you must store the hotspots or photos for your chart in the same location.

OrgPublisher appends the base URL to the beginning of each link in your chart, which means you do not have to type the complete path or string for each hotspot or photo. (At the same time, you are supporting browsers that require fully qualified URLs.) For example:

- If all the links in your chart are to email addresses of people within your organization, set up the base URL as **mailto:**. However, you must use the *Custom Field Properties* dialog to set an **Email** custom field type to create your email link.
- If you have links to company documents or photos saved on a network drive, for example the T drive, set up the base URL as **file://servername/folder name/**.
- If these documents or photos are saved on your intranet, you might set up the base URL as

  http://www.companysite.com /CompanyDocuments/.

Note: *You must include the trailing forward slash (/) in the base URL.*

You can set a base path that is unique for each custom field. This base path can be assigned in the Hotspot Wizard or using the *Attach Hotspot* dialog accessed in the *Custom Field Properties* dialog.

1. Open the *Hotspot Wizard* by clicking on the component where you want to place the hotspot and select **Tools** in the Main menu then **Hotspot Wizard** from the options list. You can also click on the Hotspot button  in the toolbar.

2. The Hotspot Wizardopens. Click **Next**.
3. Select the **Specify a base path that is unique to this field** radio button, and type or **Browse** to the base path you want to use for this custom field.
4. You can also accept the default selection, **Use the chart's global hotspot base path**, and type or **Browse** to the common path to the hotspots in your chart. See the samples above for the correct format.
5. Click **Next** and continue following the wizard dialogs.

Or

1. In the Photo Wizard, type or **Browse** to the file name of the photo in the **Photo file name** field.
2. Type or **Browse** to the common path to the photos in your chart in the **Base photo file path or URL** field. See the URL samples above for the correct format.
3. Click **Next**. If the photo preview is correct, click **Finish**. If the photo preview does not show the correct photo, click **Back** and retype or **Browse** to the correct path or URL.

Using a Target Frame

Most modern Web browsers support frames which enable you to view multiple web pages at the same time. Each frame is given an internal name so it can be the target of links or hotspots from other web pages.

To click on hotspots inside your organizational chart and display the target web page in one of the frames, you must specify the internal target frame name to OrgPublisher. Use any name that describes what will be displayed in the frame. For instance, if a profile will be displayed, call the frame Profile. This frame name should be used in the HTML document that will be called from the published chart.

1. Select **Edit** from the Main menu then **Define** from the pull-down menu. The *Define* dialog opens.
2. Select the **Hotspots** tab.
3. Type the name of the internal target frame in the **Web browser Target frame** field.
4. Click **OK**.

Using the FTP Option

If you publishing using File Transfer Protocol (FTP), you must have authority to write to the target server directory. The FTP server authority must be set to recursive to allow you to put the file in a directory you create. Otherwise, it will place your files in the server's root directory. Sometimes the user ID must also contain the domain name, for example mydomainname/myuserid.

1. Follow the Publishing Wizard until you reach the dialog requiring the **Publish to location**.

2. Select the **Send to web server (FTP)** check box in the if you want to use transfer protocol to publish your chart to your intranet. The *FTP Server* dialog opens. Type the required information to publish the chart to your intranet.
   - **Enter the user name** - Type your system user name.
   - **Enter the password** - Type your password, if any to transfer files to your web server.
   - **Confirm password** - Retype the password.
   - **Address (FTP URL or server name)** - You must type the correct IP address or server name before you can click **Browse Site**. Once you enter the server name, the dialog displays a directory tree. Navigate to the directory you want and click on it. The **Parent Dir** button enables you to move up to the parent directory, if necessary. The complete URL address displays in the **Path** field.

3. Type or browse to the path in the **Address** field. It should look something like this, <FTP://1.1.1.1> or <FTP://webservername>. Do not type the complete directory path, just connect to your directory in this step.

4. Depending on your server, you may have to type the IP address or the server name without including FTP://. When the connection is made, navigate to the correct directory and click to select it. The complete URL address displays in the **Path** field.

5. Continue following the *Publishing Wizard*.

Create or Modify a Publishing Schedule

Note: *If you choose to have more than one schedule, make sure that you set up enough time for each schedule to complete before the next one begins.*

Your machine must be turned on and the chart closed in order to publish.nough time for each schedule to complete before the next one begins.

Always open the OrgHistory Archives dialog to verify that your scheduled chart archived at the correct time.

If you are working with the OrgPublisher Web Administration server, all archived charts will be created in the server ArchivedCharts folder. In addition, if end users must access archived charts, they must be stored in the SourceCharts folder.

You can create a "read-only" archived chart just once a day (using the One time only scheduling option). If you want to archive an updated version of your "read-only" chart, you can schedule it to run the next day.

A "read-only" archived chart can be overwritten with an updated version of the same chart. A message displays verifying that the end user wants to overwrite the "read-only" archive.

Web servers do not allow clients to schedule tasks. The OrgPublisher Web Administration Server allows you to publish charts manually. You can, however, open the desktop OrgPublisher version and schedule the publishing definition in the Publish charts dialog using the Web Administration ***SourceCharts*** *folder.*

1. Log on the server as an administrator or power user.

2. Open the desktop OrgPublisher application. (If default install is used, it would be in c:/program files/orgpubx).

3. Open the chart (found in the SourceCharts folder).

4. Schedule the publishing definition in OrgPublisher using the Schedules tab.

Also, when you are publishing to ECharts, you must manually schedule the BAT file created in the first manual publishing. To do this, open the Task Scheduler on the server to add the .BAT job.

Creating a Publishing Schedule

When you schedule a chart to publish or archive, you can select how often and at what time you want the job to run.

1. Select **File** from the Main menu then **Publish** from the pull-down menu. The *Publish charts* dialog displays at the **Publishing Definitions** tab. You can also click the Publish button  in the toolbar.

2. Select the **Schedules** tab.

3. Click **New**. The *Schedule Name* dialog of the OrgPublisher Automatic Task Scheduling Wizard opens.

4. Type the schedule name in the **Name** field or accept the default name displayed. The schedule name can be the same name as the publishing definition, if you want. Click **Next**.

5. Select the publishing definition you want to publish, or you can choose **All definitions**. You should have one publishing schedule per chart, but you can create multiple schedules. Click **Next**.

6. Select a radio button for your publishing schedule. Click **Next**.

7. If you selected **One time only**, the *Schedule Once* dialog asks you to select a time of day and a date to automatically publish your chart.

   If you selected **Daily**, the *Daily Schedule* dialog asks you to select a day to automatically publish your chart. For example, if you want your chart to publish **Every weekday**, you select that radio button. If you want your chart to publish every other day, you select **2** in the **Every** field. Then you set the time and actual date to begin automatically publishing your chart.

   If you selected **Weekly**, the *Weekly Schedule* dialog asks you to select a weekly frequency in the **Every** field, such as **1** for every week, or **2** for every two weeks. Then you must enter the time and the day of the week to automatically publish your chart, such as **Sunday**. Your chart can be published on more than one day of the week.

   If you selected **Monthly**, the *Monthly Schedule* dialog asks you to select a day, such as **Day 1**, or the **First Monday** of the month to automatically publish your chart. Then you select the time and the specific months that you want your chart published.

   Click **Next**.

8. If you are using Microsoft Windows 2000, the *User ID* dialog prompts you to type a valid user name and password in order to automatically publish your chart. You must be an authorized user of Windows® XP or Windows® Vista™ to publish your charts on these operating systems. Click **Next**.

9. The *Scheduling* dialog displays a recap of your publishing selections. If the information is correct, click **Finish**. If you need to modify information, click **Back** until you reach the appropriate dialog and repeat steps above to complete your scheduling.

Scheduling a Daily Job

1. Select the **Schedule now** radio button and click **Finish** in the OrgHistory Archive Wizard or the Publishing Wizard. The OrgPublisher Automatic Task Scheduling Wizard opens. You can also access the task scheduling in the **Archive Schedule** tab by selecting the archive definition and clicking **Update** or **New**. Click **Next**.

2. Follow the wizard prompts until you reach the *Schedule Frequency* dialog. Select the **Daily** radio button. Click **Next**.

3. You can select the **Every x days** or the **Every weekday** radio button; for instance, the first option runs the job every 2 days, and the second option runs the job every day Monday through Friday.

4. Use the up or down arrow to **Select the time of day** to run the scheduling job, for instance 1:00:00 PM.

5. Use the down-arrow to **Select the date** you want the job to begin, for instance 11/16/2005. Click **Next**.

6. Continue with the *Automatic Task Scheduling Wizard*. The last dialog displays if you have successfully completed the scheduling. Click **Finish**. You can also click **Back** and change your scheduling information.

Scheduling a Monthly Job

1. Select the **Schedule now** radio button and click **Finish** in either the *OrgHistory Archive Wizard* or the *Publishing Wizard*. The OrgPublisher *Automatic Task Scheduling Wizard* opens. You can also access the task scheduling in the **Archive Schedule** tab by selecting the archive definition and clicking **Update** or **New**. Click **Next**.

2. Follow the wizard prompts until you reach the *Schedule Frequency* dialog. Select the **Monthly** radio button. Click **Next**.

3. You can choose the appropriate radio button to run the scheduling job on a specific day or a relative day of the month. Use the up or down-arrow to select a specific **Day of the month**, for instance 1 or 15. Use the down arrows to select a relative day, for instance **The First Monday**.

4. To **Select the time of day** to run the scheduling job, use the up or down-arrow to choose the time, for instance 1:00:00 PM.

5. To **Select the specific months** to run the scheduling job, select the appropriate check boxes; for instance to run the job quarterly you select **January**, **April**, **July**, and **October**. Click **Next**.

6. Continue with the Automatic Task Scheduling Wizard. The last dialog displays if you have successfully completed the scheduling. Click **Finish**. You can also click **Back** and change your scheduling information.

Scheduling a One Time Only Job

1. Select the **Schedule now** radio button and click **Finish** in either the OrgHistory Archive Wizard or the Publishing Wizard. The OrgPublisher *Automatic Task Scheduling Wizard* opens. You can also access the task scheduling in the **Archive Schedule** tab by selecting the archive definition and clicking **Update** or **New**. Click **Next**.

2. Follow the wizard prompts until you reach the *Schedule Frequency* dialog. Select the **One time only** radio button. Click **Next**.

3. Use the up or down-arrows to **Select the time of day** you want the schedule to run, such as 1:00:00 PM.

4. Use the down-arrow to **Select the date** you want the schedule to run, such as 11/16/2005. Click **Next**.

5. Continue with the *Automatic Task Scheduling Wizard*. The last dialog displays if you have successfully completed the scheduling. Click **Finish**. You can also click **Back** and change your scheduling information.

Scheduling a Weekly Job

1. Select the **Schedule now** radio button and click **Finish** in either the *OrgHistory Archive Wizard* or the *Publishing Wizard*. The OrgPublisher *Automatic Task Scheduling Wizard* opens. You can also access the task scheduling in the **Archive Schedule** tab by selecting the archive definition and clicking **Update** or **New**. Click **Next**.

2. Follow the wizard prompts until you reach the *Schedule Frequency* dialog. Select the **Weekly** radio button. Click **Next**.

3. To **Select a weekly frequency**, use the up or down-arrow to choose **Every x week**, for instance, every 2 weeks.

4. To **Select the time of day** to run the scheduling job, use the up or down-arrow to choose the time, for instance 1:00:00 PM.

5. To **Select the days of the week** you want the job to run, select the appropriate check box; for instance, if you want the job to run at the beginning and middle of the week, you might select **Monday** and **Wednesday**. You can also schedule the job to run on weekends by selecting **Saturday** or **Sunday**. Click **Next**.

6. Continue with the Automatic Task Scheduling Wizard. The last dialog displays if you have successfully completed the scheduling. Click **Finish**. You can also click **Back** and change your scheduling information.

Scheduling an EChart

You can schedule an EChart to automatically publish using Microsoft Windows Task Scheduler, included in Internet Explorer 4.0 and later. Task Scheduler prompts you to provide a user ID and password, which verify that you have the necessary access rights to run the scheduled task.

You must be a member of the local **Administrators group** on the computer executing the task. You may have to work with your Systems Administrator to schedule this task. You can reschedule an EChart to publish using this same procedure.

1. Publish your EChart using the Publishing Wizard. This creates a batch file.

2. Run the batch (BAT) file. ***This file assumes that publishing and server processing occur on the same machine.***

   You can modify the batch file (BAT) produced by the Publishing Wizard in order to publish to a location other than the web server. Doing this may minimize chart "down time" if your chart is extremely large (200,000+ records) or if resources are limited on the web server. EChart publishing is very CPU intensive and may affect other processes running on the server.

   The batch file must be modified after you publish, so that the following steps occur in this order:

   a. Move the EChart files to the server (if not publishing directly to the server).

   b. Unload the EChart from the server's memory.

   c. Reload the EChart into the server's memory.

Note: *The batch file will not be overwritten during publishing, so any modifications you make will be preserved.*

3. Open the Microsoft Task Scheduler from the **Control Panel** in Windows 2000 and Windows XP (or from **My Computer** in Windows NT).

4. Double-click **Scheduled Tasks**. The *Scheduled Tasks* window opens.

5. Double-click **Add Scheduled Task** and follow the wizard prompts to set up the batch file as a scheduled task.

Updating or Deleting a Publishing Schedule

1. Select **File** from the Main menu then **Publish** from the pull-down menu. The *Publish charts* dialog displays at the **Publishing Definitions** tab. You can also click the Publishing button 

in the toolbar.

2. Click on the **Schedules** tab.

3. Click **Update** to modify a schedule and continue with Step 4. Click **Delete** to permanently remove a schedule. A message confirms that you want to delete the selected schedule. Click **Yes** and proceed to step 9.

4. Select or type the schedule name in the **Name** field or accept the default name displayed. The schedule name can be the same name as the publishing definition, if you want. Click **Next**.

5. Select the publishing definition you want to update, or you can choose **All definitions**. You should have one publishing schedule per chart, but you can create multiple schedules. Click **Next**.

6. Select a radio button for your publishing schedule. Click **Next**.

7. If you selected **One time only**, the *Schedule Once* dialog asks you to select a time of day and a date to automatically publish your chart.

   If you selected **Daily**, the *Daily Schedule* dialog asks you to select a day to automatically publish your chart. For example, if you want your chart to publish **Every weekday**, you select that radio button. If you want your chart to publish every other day, you select **2** in the **Every** field. Then you set the time and actual date to begin automatically publishing your chart.

   If you selected **Weekly**, the *Weekly Schedule* dialog asks you to select a weekly frequency in the **Every** field, such as **1** for every week, or **2** for every two weeks. Then you must enter the time and the day of the week to automatically publish your chart, such as **Sunday**. Your chart can be published on more than one day of the week.

If you selected **Monthly**, the *Monthly Schedule* dialog asks you to select a day, such as **Day 1**, or the **First Monday** of the month to automatically publish your chart. Then you select the time and the specific months that you want your chart published.

Click **Next**.

8. If you are using Microsoft Windows 2000, the User ID dialog prompts you to type a valid user name and password in order to automatically publish your chart. You must be an authorized user of Windows® 2000, Windows® XP, or Windows® Vista™ to publish your charts on these operating systems. Click **Next**.

9. The *Scheduling* dialog displays a recap of your publishing selections. If the information is correct, click **Finish**. If you need to modify information, click **Back** until you reach the appropriate dialog and repeat steps above to complete your scheduling.

Deleting a Schedule in Microsoft Explorer

You can delete a publishing schedule using the **Schedules** tab of the *Publish charts* dialog or through Microsoft Explorer. To delete a schedule using Microsoft Explorer:

1. Locate the **Scheduled Tasks** folder on your PC. In Windows 2000, this folder is found by clicking **Start** on the task bar then **Settings** and **Control Panel**.

2. Select the schedule you want to delete and press **DELETE**. The schedule no longer exists.

CHAPTER 10

ARCHIVE YOUR CHARTS

Note: *Web servers do not allow clients to schedule tasks. The OrgPublisher Web Administration Server allows you to publish charts manually. You can, however, open the desktop OrgPublisher version and schedule the publishing definition in the Publish charts dialog using the Web Administration SourceCharts folder.*

1. Log on the server as an administrator or power user.

2. Open the desktop OrgPublisher application. (If default install is used, it would be in c:/program files/orgpubx).

3. Open the chart (found in the SourceCharts folder).

4. Schedule the publishing definition in OrgPublisher using the Schedules tab.

Also, when you are publishing to ECharts, you must manually schedule the BAT file created in the first manual publishing. To do this, open the Task Scheduler on the server to add the .BAT job.

Creating a New Archive Chart

Note: *The Position ID type provides a unique record number across all charts. If the charts you are comparing charts that do not contain a Position ID type in field 17 or a custom field position ID, OrgPublisher uses the person ID in field 5 from the Input File Layout. If neither a position or person ID exist, an error message displays and the comparison does not occur. For the most consistent results, it is recommended that you assign a unique identifier field for each record in charts that you want to compare.*

You can create a "read-only" archived chart just once a day (using the "One time only" scheduling option). If you want to archive an updated version of your "read-only" chart, you can schedule it to run the next day.

A "read-only" archived chart can be overwritten with an updated version of the same chart. A message displays verifying that the end user wants to overwrite the "read-only" archive.

If you are working with the OrgPublisher Web Administration server, all archived charts will be created in the server ***ArchivedCharts*** *folder. In addition, if end users must access archived charts, they must be stored in the* ***SourceCharts*** *folder.*

With OrgPublisher you can save a "snapshot" of an organizational chart and use OrgHistory to archive it for future reference.

1. Click the Manage OrgHistory Archives button  in the Main toolbar. The *OrgHistory Archives* dialog opens. You can also select **Tools** from the Main menu then **Manage OrgHistory Archives** from the options list.
2. Click **New**. The OrgHistory Archive Wizard opens.
3. Type or **Browse** to the folder where you want to store your archived charts.
4. Accept the default name for the archived chart, which is the chart name, or type a new name. When the archived chart is saved, OrgPublisher adds the date to the beginning of the file name, for instance, "20050815_Martin." Click **Next**.
5. Select the **Password protect this chart** check box if you want to assign a password to the archived chart. Type the password and select the encryption method radio button, **40 bit encryption** or **128 bit encryption**.
6. All fields display in archived charts. If your chart contains secure custom fields you can choose to remove the data from those secured fields in the archived chart. Select the **Remove secure field data** check box. Click **Next**.
7. OrgPublisher defaults to **Sign archived charts**. If you do not want to archive the chart with a signature, clear the check box. See the Work with Signed and Read-Only Archive Charts procedure for more information.
8. OrgPublisher also defaults to **Mark archived charts as read-only**. You can clear the check box if you do not want to archive the chart as read-only. See the *Working with Signed and Read-Only Archive Charts* procedure for more information. Click **Next**.
9. If you highlighted a box other than the top of chart in OrgPublisher, you can select the **Exclude positions above** check box to archive the chart only from the selected box down.
10. If you navigated through the chart you want to archive and left the cursor at a box other that the top box in the chart, you can click **Reset Starting Box**. Click **Next**.
11. You can select to archive your chart immediately or later. Select the appropriate radio button.

– **Execute now** archives the chart immediately, placing it in the folder you designated in the wizard. The *Archive Charts* dialog opens to display the names of all your archived charts. A message displays verifying that the chart has been archived with a link you can click to preview the archived chart.
– **Execute later** places the name of your chart in the *Archive Charts* dialog but will not create the archived chart until you return to the dialog and click **Archive**.
– **Schedule now** opens the OrgPublisher *Automatic Task Scheduler* which walks you through scheduling a date and time to archive your chart.

Using the OrgHistory Archives Dialog

The *OrgHistory Archives* dialog opens when you click the Manage

OrgHistory Archives button  in the Main toolbar or when you click **Finish** in the OrgHistory Archive Wizard after you have selected the **Schedule Now** option. The *OrgHistory Archives* dialog contains two tabs, **Definitions** and **Archive Schedule**. You can also access the **OrgHistory Archive Browser** from this dialog.

You can use this dialog to open the *OrgHistory Archive Wizard* to create a new archived chart or update existing archived chart definitions, review a list of archived charts and schedules. You can also delete archived charts and set new schedule times to automatically archive charts.

Note: *Always open the OrgHistory Archives dialog to verify that your scheduled chart archived at the correct time.*

Scheduling a Chart for Archive

You can schedule a date and time to archive your charts. You can start the task scheduler at the end of the *OrgHistory Archive Wizard* or in the **Archive Schedule** tab of the *OrgHistory Archives* dialog.

1. If you select **Schedule Now** in the *OrgHistory Archive Wizard*, the OrgPublisher Automatic Task Scheduling Wizard opens when you click **Finish**. You can also access the task scheduling in the **Archive Schedule** tab by selecting the archive definition and clicking **Update** or **New**. Click **Next**.

2. In the *Schedule Name* dialog, type the **Name** you want to assign to the archived chart. Click **Next**.

3. Select the scheduling definition you want to archive. If this is your first archive, only this definition displays in the list pane of the dialog. Click **Next**.

4. In the *Schedule Frequency* dialog, select the radio button that fits your scheduling needs. Options are **One time only**, **Daily**, **Weekly**, and **Monthly**. Click **Next**.

5. If you selected **One time only**, the next dialog prompts you to Select the time of day and **Select a date** using the drop-down arrows. Click **Next**.

   If you selected **Daily**, the next dialog prompts you to select a frequency to archive, such as every 2 days or **Every weekday**. You must also **Select the time of day** and **Select the date** to begin. Click **Next**.

   If you selected **Weekly**, the next dialog prompts you to select a frequency to archive, such as every 3 weeks. You must also **Select the time of day** as wells as **Select the days of the week** to archive. Click **Next**.

   If you selected **Monthly** the next dialog prompts you to select the **Day** or specified day, such as the **First Monday**. You must also **Select the time of day** and **Select the specific months**, such as January and April.

6. In the *User ID* dialog, your login ID displays in the **Type user name** field. Complete the **Type password** and **Confirm password** fields. Click **Next**.

   If a password is not entered, a message verifies that you want to continue. If you select **Yes**, the scheduling proceeds without requiring a password.

7. The last dialog opens if you have successfully completed the scheduling. Click **Finish**. You can also click **Back** and change your scheduling information.

Updating an Archive Definition

You can use OrgHistory save a "snapshot" of an organizational chart and archive it for future reference. You can also update that snapshot if an archive definition already exists.

1. Click the Manage OrgHistory Archives button  in the Main toolbar. The *Archive Definitions* dialog opens. You can also select **Tools** from the Main menu then **Manage OrgHistory Archives** from the options list.

2. Click **Update**. The OrgHistory Archive Wizard opens.
3. Complete the wizard dialog prompts to update the archive definition following the steps for Creating a New Archive Chart.

Updating an Archive Schedule

1. Select **Tools** from the Main menu then **Manage OrgHistory Archives** from the options list. You can also click the Manage OrgHistory Archives button  in the toolbar. The *OrgHistory Archives* dialog opens at the **Definitions** tab.
2. Click on the **Archive Schedule** tab.
3. Select a schedule from the displayed list and click **Update**.
4. Complete the wizard dialog prompts to update the archive definition following the steps for Scheduling a Chart for Archive.

Deleting an Archive Chart

You can delete an archived chart definition using the *OrgHistory Archives* dialog.

1. Click the Managing OrgHistory Archives button  in the toolbar to open the *OrgHistory Archives* dialog. The **Definitions** tab displays all archive chart definitions.
2. Select the definition you want to delete. Click **Delete**. The archive chart file is removed.
3. Click **OK** to close the dialog and return to the chart.

Deleting an Archive Schedule

1. Click the Managing OrgHistory Archives button  in the toolbar to open the *OrgHistory Archives* dialog.
2. Select the **Archives Schedule** tab.
3. Select the schedule you want to delete. Click **Delete**. The archive schedule is removed.
4. Click **OK** to close the dialog and return to the chart.

Resetting Starting Box in OrgHistory Archive Charts

When you use OrgPublisher's OrgHistory feature, you can use the reset starting box option in the OrgHistory Archive Wizard if you want the archived chart to start at the currently selected top box shown in the *Chart View*. You can use this feature to archive only a specific part of your hierarchy within the chart.

1. Follow the *OrgHistory Archive Wizard*, selecting where you want to store the archived chart, whether or not you want to password protect the archive or remove secure fields, mark archives as read-only, until you reach the dialog with the **Reset Starting Box** button.
2. If you select **Exclude positions above**, the archived chart will only provide information from the selected box and below in the hierarchy.
3. If you do not select **Exclude positions above**, users can navigate upward in the chart to the additional hierarchical information.
4. Click **Rest Starting Box**. A message verifies that you want to reset the top of box. Click **Yes**. Click **No** if you decide not to reset the top of box.
5. Continue with the *OrgHistory Archive Wizard*.

Comparing Two Charts

You can compare two organizational charts in the OrgPublisher application that have identical custom field definitions, and generate a change report. Fields that do not match will not be listed on the change report.

Note: *The Position ID type provides a unique record number across all charts. If the charts you are comparing charts that do not contain a Position ID type in field 17 or a custom field position ID, OrgPublisher uses the ID in field 5 from the Input File Layout. If neither a position or person ID exist, an error message displays and the comparison does not occur. For the most consistent results, it is recommended that you assign a unique identifier field for each record in charts that you want to compare.*

In addition new or renamed custom fields will not match when comparing charts and will not be included in the change report.

1. Select **Tools** from the Main menu then **Compare two charts** from the options list. The *Compare Charts* dialog opens.

You can also click **Compare** in the **Definitions** tab of the *OrgHistory Archives* dialog.

2. Type or **Browse** to the first chart in the **Select the first (older) chart to compare** field. This should be the original or older chart.
3. Type or **Browse** to the second chart in the **Select the second (newer) chart to compare** field. This should be the modified or newer chart.
4. You can also select the default options for your change report by clicking **Customize change report**. See the Setting Change Report Default Options procedure for additional information.
5. Click **View Change Report** to view the results of the comparison, or click **Cancel**.

   Depending on which viewing option you selected when you customized the report, it displays either in a web browser or in Microsoft® Excel.

   The report defaults to the name **OrgPubChangeReport.htm** and is placed in a temporary folder. You can rename the report and save it in a specified folder.

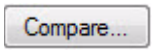
   The figures in the **Before** column represent the first chart you selected. The figures in the **After** column represent the second chart you selected.

Note: *You can also compare two archived charts and generate a change report using the OrgHistory Archives dialog.*

Using the OrgHistory Archive Browser

Once you have created one or more archive definitions, you can access these definitions through the OrgHistory Archives dialog.

- Click 

or 

to open the *OrgHistory Archive Browser*.
- The left-hand pane lists the **OrgHistory Archive Definitions** for the current chart.
- When you double-click on a definition, it displays in the right-hand pane, **OrgHistory Archives**. Select the definition then click 

to open the archive.

- If you accessed the *OrgHistory Archive Browser* by clicking 

in the **Definitions** tab, you can use the **CTRL** key to select archives then click **Compare** to view a change report.

CHAPTER 11

WORK WITH ORGANIZATIONAL PLANNING

Note: *It is recommended that you do not combine the Succession planning and Organizational planning features as unexpected results may occur. Succession planning is designed to help you match people to specific positions with no hierarchical information involved. OrgPlan is designed as an organizational modeling tool based on a hierarchy.*

When you create a planning chart, verify that the box you have selected as top of chart is correct. Once the planning chart is created, drilling up from the designated top of chart is not available.

*Planning charts do not contain a separate **My groups** tab in the Search View. If you already have groups in the **My groups** tab in the PluginX chart however, those groups are copied to the planning chart.*

If you renewed maintenance from a previous OrgPublisher Enterprise version that included the organizational planning client, that feature is included in the OrgPublisher 9 version.

A new custom field type of Position ID is available for use in comparing and reporting on planning files. This field should contain a unique number for each record across all charts and including open positions. If the charts you are comparing do not contain a custom Position ID type, OrgPublisher uses the ID in field 5. If neither exists, OrgPublisher displays an error message and the comparison does not occur.

If you save multiple planning charts to the same web folder, you should specify separate storage folders in order to maintain user name and password security.

Planners may encounter an error when sending a planning chart created on a local machine using Microsoft Vista. It is recommended that administrators use a secured server location.

OrgAnizational Planning for Administrators

Working with Organizational Planning Charts

With OrgPublisher Premier, you can publish a web-based chart for org model planning as well as succession planning. This topic covers organizational planning; see the Working with Succession Planning for details about succession charts.

Planning administrators can create a new planning chart, modify an existing chart, or delete a planning chart. Selected individuals, or planners, can create and share organizational models. Planners can modify any data fields displayed in the Chart View. Data fields administrators want to keep in the chart, but do not want modified, can be displayed in the Profile View. And, since planners cannot add or delete custom fields, administrators still maintain control over the custom fields you decide to use in the chart.

Note: *If you renewed maintenance from a previous OrgPublisher Enterprise version that included the organizational planning client, that feature is included in the OrgPublisher 9 version.*

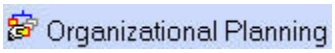
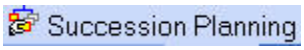
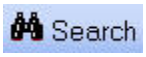
Administrators enable planning charts while using the Publishing Wizard, and can customize change report options, enable the revision history, or password protect planning charts. If your chart contains photos, it is best to hide the photos for your planning chart. The administrator or specified group member can then create a planning chart using the Planning button 

.

Before starting the *Publishing Wizard*, please review Preparing to Publish a Chart with the Org Modeling Feature.

The planning enabled published chart toolbar includes the following buttons.

Button	Action
	Click this button to view information about the version of OrgPublisher you are using.
	Saves the chart. If this is a new chart, the *Save As* dialog displays so that you can assign a name to the file.

Button	Action
	Button available in planning enabled published charts if both org model and succession planning have been selected. Click to select the *Organizational Planning* or *Succession Planning* dialog to manage planning charts.
	Button available when the Organizational planning option only is selected in the Publishing Wizard. Click to view the *Organizational Planning* dialog.
	Button available when the Organizational planning option only is selected in the *Publishing Wizard*. Click to view the *Succession Planning* dialog.
	The Cut button sends a copy of the selected text or object to the clipboard and leaves the text or object on the screen.
	Prints the chart. Prints a specific chart view if it is selected in **Print Options** or the Print Wizard dialog.
	Displays the chart as it will look when you print it and is only available in the Chart View.
	Opens the system *Print Setup* dialog.
	Opens the preview dialog and displays the chart as it will look in Microsoft® PowerPoint, and is only available in the *Chart View*.
	Click this button to move the *Chart View* to the top center of the displayed drilling level.
	Click this button to display the *Search* dialog at the **Name** tab.
	Use this field to enter your basic toolbar search text. Searches are based on text you enter in the toolbar field or select from the drop-down list, if previous toolbar searches have been performed. You can type one or two words, such as first name and last name. Searches all fields one field at a time.
	Click this button to make a selected box the center of the chart display.
	Click this button to set the zoom percent for the chart display.
	Clicking this button designates the selected box as the top of your chart for the selected style.
	Click this button to display the chart from the highest box in the hierarchy.

Button	Action
	Click this button to enable the drill buttons in your chart which facilitate navigation between shown and hidden levels.
	Click this button to select the number of levels from the drop-down list that you want to display.
	Click this button to open and close the Style View, which displays the styles available for the open chart.
	Click this button to open and close the Tree View, which displays the chart in an outline format. Click on a position or name to locate it in the chart.
	Click this button to open and close the List View, which lists employees in the chart. The view contains two panes. One pane lists only the employees in the portion of the org chart that is shown. The **List View** pane shows custom information such as telephone numbers and office locations and is used as the index for a chart printed in Book style format. You can click on a name in this list to locate it in the chart. Columns can be sorted. The **Search View** pane enables you to conduct a search for specific information, and to create and save a new group. Click on a name in this list to locate it in the chart. The Search View can, typically, also list everyone in the chart. Columns can be sorted.
	Click this button to open and close the Profile View, which displays information about an employee or position, including custom fields that are defined for that position type.
	Click this button to open and close the *Summary View*, which displays summary fields and totals by position type and group.
	Click this button to open the *9 Box Matrix* which displays a matrix of your talent pool.
	Click this button to open the help file.

With planning enabled charts, you can:

Copying a Link to a Person in the Chart

Creating a New Planning Chart

Deleting a Planning Chart

Opening a Planning Chart

Previewing a Book Style Chart or Previewing a Wall Style Chart

Printing Your Chart as a Book or Printing in Wall Chart Style

Sending Email to a Group

Storing Planning Charts

Organizational planning charts can be saved to the end user's local hard drive or to your web server in a subfolder automatically created by OrgPublisher. If you elect to use a web server, you can use the EChart options to add security to the planning charts. End users can see a list of planning charts created by themselves and their subordinates. Administrators can password protect the planning chart and, if more than one user tries to open the same chart, a message notes that someone else is modifying the chart and a read-only option is available.

Once a planning chart is opened in OrgPlan, a special menu and toolbar are available. Planning charts are always in *Build Mode*. *Build Mode* does not reflect special formatting, such as multi-level peer display, reports in the same box as their manager, or the advanced box layout settings. The menu and toolbar offer several new options to end users which enable them to modify and save planning charts, as well as generate a change report or view a revision history.

See the How to Get Started with Organizational Planning Charts topic for more information. In addition, several planning chart provisions apply.

Note: *Planners may encounter an error when sending a planning chart created on a local machine using Microsoft Vista. It is recommended that administrators use a secured server location.*

If you save multiple planning charts to the same web folder, you should specify separate storage folders in order to maintain user name and password security.

Organizational Planning or Succession Planning

Available in OrgPublisher Premier, you can publish charts for planning when publishing a PluginX or EChart rich client chart.

Planning administrators can create a new planning chart, modify an existing chart, or delete a planning chart. Planners can modify any data

fields displayed in the Chart View. Data fields administrators want to keep in the chart, but do not want modified, can be displayed in the Profile View. And, since planners cannot add or delete custom fields, administrators still maintain control over the custom fields you decide to use in the chart.

Administrators enable planning charts while using the Publishing Wizard, and can customize change report options, enable the revision history, or password protect planning charts. If your chart contains photos, it is best to hide the photos for your planning chart. The administrator or specified group member can then create a planning chart using the Planning button 

.

OrgPublisher's succession planning feature enables you to create a chart specifically for analyzing potential successors to jobs in your company.

Function	Organizational Planning	Succession Planning
Drag and drop Chart View employees	You can move the employee to a new location within the chart with drag and drop.	You must copy the employee into the target box as a successor. Dragging within a list of successors in a box allows user to rank their successor list.
Deleting successors	When the employee is deleted from the position, OrgPlan creates an open position.	When deleting the last successor on a box, Succession does NOT leave (create) an open position.
Compact Build Mode button	Removes the display of all data except the name from the chart box for a more compact view of the structure.	This option is not available in succession planning.

Function	Organizational Planning	Succession Planning
Toolbar buttons	All buttons for inserting positions, jobs and boxes are available.	These buttons are not available in succession planning: • Insert a Box containing an open position • Insert Box containing a person • Insert Box • Insert Job • Insert Person • Insert Open Position • Insert Assistant • Insert Partner Box The associated menu items are also removed.
Data Editing	All fields displayed in the chart box (except the name) may be modified by the planner. Double-click on the name or job title to change the position type.	No displayed fields of data may be edited.
Cut/Copy/ Paste	Cut and paste options are available.	You can “copy” existing employees (for subsequent pasting as a successor). Successors may be “cut” from the chart.
Delete	Delete is available for data fields within a chart box.	Delete is not available for existing employees, but is allowed for successors only.
Search View	Standard search features and results as defined by the chart administrator are available.	Enhanced to show successors. A successor icon reflects successor status.

Preparing to Publish a Chart with the Org Modeling Feature

The best way to prepare your chart for the Organizational Planning feature (OrgPublisher Premier) is to create a new chart with a different data extraction that contains only the custom fields needed for your planning chart. This ensures that the planning chart does not contain fields you do not want the planners to see, for instance, salaries. You can display fields you do not want updated by planners in the Profile View only, as updates are permitted in the Chart View only.

Before you publish a chart with the planning feature enabled, you should also answer the following questions.

1. Who needs access to the OrgPlan feature?
   - **EChart Rich Client** publishing gives the most flexibility in controlling who can use OrgPlan and what portion of the hierarchy they can access.
   - **PluginX** publishing gives the OrgPlan function to everyone and does not restrict what portion of the hierarchy the planner can manipulate.
2. Can they plan only for their group or for the whole organization?
   - If publishing an EChart rich client, you can create two groups:
     - a) Create a group with access to the complete hierarchy (such as "HR Planning Coordinators").
     - b) Create a group with specific span of control planning (such as "Managers Only").
   - EChart rich client publishing prompts you for access levels of the OrgPlan feature; select the appropriate group for each option.
3. How do I activate OrgPlan?
   - Select either **PluginX** or **EChart Rich Client** in the Publishing Wizard and select the **Enable what-if planning** check box.
4. How do I secure the planning charts?
   - In the *Publishing Wizard*, select **Require that all planning charts be password protected**. If you do not require this at publishing time, the option is still available for the planner when the planning chart is created.
   - If publishing as **PluginX**, you can select either **40 bit encryption** or **128 bit encryption**. This is the only security method for PluginX.
   - If publishing an **EChart Rich Client**, user IDs and passwords or Windows NT authentication are key to identifying a user in a group and authorizing the use of OrgPlan.
     - **Windows NT operating system authentication** - The server automatically recognizes you by your Windows NT login and password.
     - **Chart** - The server prompts each user to enter a user ID and password.
     - **System User ID/box Linkage (not secure)** - The server recognizes you by your local user account information.
     - **Starting box in chart** - Provides control for the location of where the user opens the chart.
     - **Allow users to drill up from starting box** - Leave unchecked to prevent users from drilling to other areas of the chart.
5. Where do the planners send the results?

- If you select **Enable revision history** in the Publishing Wizard, the planner is prompted to log their activity as they save a planning chart.
- Click the **Set default options** for change report button to modify the default change report output. The planner can change the default settings, when requesting a change report.
- Storage of the planning charts is also determined at publishing time. ECharts allow storing on a local hard drive or on the EChart server. PluginX automatically stores on the local hard drive.

Organizational Planning Chart Provisions

The Organizational planning feature, available in OrgPublisher Premier, is intended to provide organizational modeling opportunities. This page contains some provisions you should remember when publishing planning-enabled charts.

- Do not combine the Succession planning and Organizational planning features, as unexpected results may occur. Succession planning is designed to help you match people to specific positions with no hierarchical information involved. Organizational planning is designed as an org modeling tool based on a hierarchy.
- Only one person can work on a specific organizational planning chart at a time.
- Employees cannot be renamed. Names can be cut and pasted, and unassigned employees in ECharts can be selected to add to the chart.
- New custom fields cannot be added.
- Fields displayed only in the Profile View cannot be modified.
- Formatting options and styles are disabled.
- End users can use the Search View to spotlight search results or a selected group in the Chart View.
- OrgPlan users cannot enable a chart legend, but, if the planning chart is published with a chart legend, end users can modify the existing legend.
- The *Hover Profile* is not available in Organizational planning charts.
- Employees and boxes cannot be copied, only cut and pasted.
- End users can email a planning chart to another planning user.

- If data modifications are noted when a chart is saved, the end user is prompted to enter a description for the revision history.

Publishing a Chart for Org Model Planning

You can publish a web-based chart for organizational model (what-if) planning using OrgPublisher Premier. Once OrgPlan charts are created, they are always in *Build Mode* to allow modifications to chart components.

Planning administrators can create a new planning chart, modify an existing chart, or delete a planning chart. Planners can modify any data fields displayed in the Chart View. Data fields you want to keep in the chart, but do not want modified can be displayed in the *Profile View*. And since planners cannot add or delete custom fields, you still maintain control over the custom fields you decide to use in the chart.

Note: *If you save multiple planning charts to the same web folder, you should specify separate storage folders in order to maintain user name and password security.*

*Planning charts do not contain a separate **My groups** tab in the Search View. If you already have groups in the **My groups** tab in the PluginX chart however, those groups are copied to the planning chart.*

1. Click the Publish button 

in the toolbar or the Publishing Wizard button  in the Wizard View. You can also select **Tools** from the Main menu then **Publishing Wizard** from the options list. The Publishing Wizard opens.

2. Select **Advanced Mode** and follow the wizard dialogs, selecting the **Interactive Org Chart** option then either the **PluginX** or **EChart Rich client** format.

3. In the *OrgPlan* dialog, select the **Enable Organizational Planning** check box. Click **Next**.

4. If you want the planning chart to record the Windows NT user sign-on ID and a comment, if supplied, for each change, click the **Enable revision history** check box.

5. If you want planning charts password protected, click the **Require that all planning charts be password protected** check box.

6. If you want an indicator in the chart where changes have been made, select the **Show visual indicator for changes** check box.

7. If you want to select the defaults for the planning change report, click **Set default options for change report** to open the Change Report Options dialog. See the Setting Change Report Default Options procedure in this document for detailed information. Click **Next**.

8. Select the context menu commands you want to make available in both the planning-enabled PluginX the planning chart by expanding each menu and selecting the options you want.

9. Click **Next** and continue with the publishing procedure.

10. When the chart is published, planning administrators click the Planning button 

in the toolbar. The *Organizational Planning Charts* dialog opens.

11. To create a new chart, select **New**. See the Creating a New Planning Chart procedure for more detailed information.
    When the chart is published, the planning administrator sees one of the following button options, based on the chart administrator's selection.

    Organizational Planning only is available - 

    Succession Planning only is available - 

    Organizational and Succession Planning are available - 

 - the Planning button options list displays when the button is clicked.

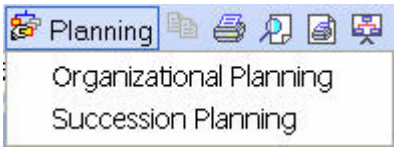


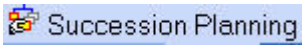
Figure 118

Managing Planning Charts

When viewing a published planning enabled chart (OrgPublisher Premier), you can manage the planning charts.

When you click the planning charts button the first time, the standard create a chart dialog opens. The planning button varies, based on the type of planning chart.

Org model planning button - 

Succession planning button - 

Both planning options - 

If a planning chart already exists, you see the list of existing charts. You can select a chart to delete, open to edit, or create a new planning chart. You can also choose to create a new planning chart.

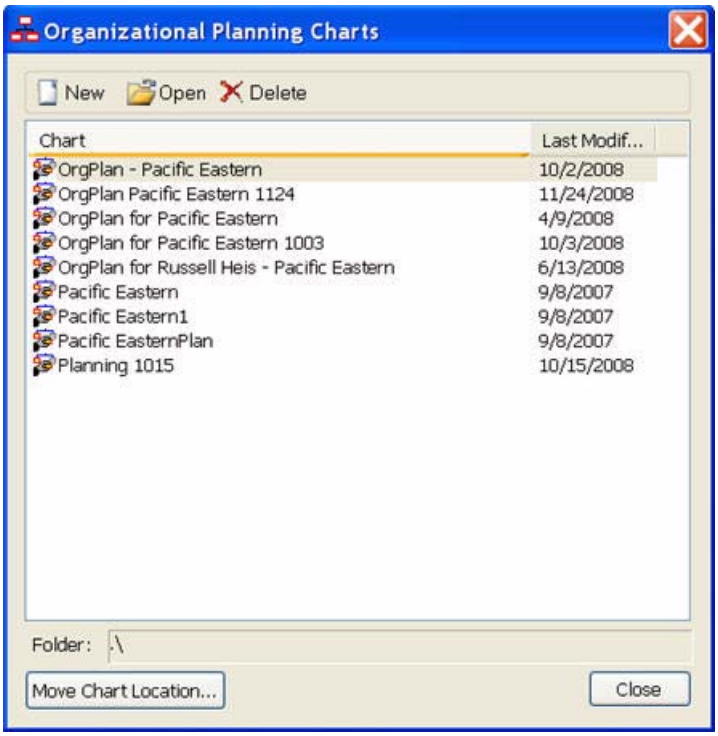


Figure 119

Creating a New Planning Chart

When a chart is published in OrgPublisher Premier with the org model planning feature enabled, end users can open the PluginX or EChart rich client chart and create new or work with existing OrgPlan charts.

Planning administrators can create a new planning chart, modify an existing chart, or delete a planning chart. Planners can modify any data fields displayed in the Chart View. Data fields administrators want to keep in the Profile View only, cannot be modified. So the administrator can maintain control over the custom fields in the chart, planners cannot add or delete custom fields.

1. Open the planning-enabled chart in the web browser and click the Planning button 

.
2. Select **Create new planning chart**. The *Create New Planning Chart* dialog opens. The dialog will note where the planning chart begins, such as "This chart will include boxes from (name) and down." For instance, your chart administrator may publish the chart for you to work from your box down.
3. Type a name for the chart if you do not want to accept the default. The planning chart name defaults "OrgPlan for" and names the top person in the chart, as well as the name of the original chart.
4. If not already enabled by the chart administrator, you can select the **Password protect this chart** check box to require typing a password whenever the chart is opened.
5. Type the **Password** then **Retype password**.
6. You can limit the number of levels available to planners by selecting the **Restrict planning chart size** check box.
7. If you want a shortcut to the planning chart to display on your desktop, select the **Create a shortcut to the chart on my Windows desktop** check box.
8. Click **Create and edit chart**. The browser opens the planning chart with the Insert toolbar, the Generate a change report  , and email  buttons enabled. See the Generating a Change Report procedure for detailed information.

   The planning chart saves to the folder specified when the original chart was published. PluginX planning charts can be saved to the

local hard drive or the web server. See the Working with Organizational Planning Charts topic for additional information.

Opening a Planning Chart

Planning administrators can open a planning chart (OrgPublisher Premier) from the planning-enabled published chart. Planning charts are always in *Build Mode*.

1. Click on the Planning button 

in the toolbar.
2. Select **Open planning chart** from the options list. A list of available planning charts displays in a pull-down list.
3. Click on the chart name you want. The planning chart opens in the OrgPlan client.
4. Return to the planning-enabled chart by clicking the Back button  in the browser.

Deleting a Planning Chart

Planning administrators can delete a planning chart from the planning-enabled published chart (OrgPublisher Premier).

1. Open the planning-enabled published chart in the web browser. Click on the Planning button 

in the toolbar. A drop-down menu appears.
2. Select **Delete planning chart**. A list of all planning charts appears.
3. Select the chart you want to delete. A message displays verifying that you want to delete the chart.
4. Click **Yes**. A message verifies that the chart has been deleted.

Storing Planning Charts

When you publish a secured EChart using OrgPublisher Premier's organization modeling or succession planning, you can store your planning charts either on the end user's PC or the EChart web server. Planning charts can be shared via email when using the end user PC option. With

the server option, each end user automatically has access to planning chart information that exists at or below the user's box in the hierarchy.

Storing the planning charts on the server makes sharing them very easy, but, possibly, makes the information in them highly vulnerable. It is essential that the folder in which they are stored is properly secured.

1. In the planning chart, select **File** from the Main menu then **Preferences** from the options list. The *Preferences* dialog opens.



Figure 120

The dialog displays the default locations set by the IT administrator. If you have the appropriate permissions, you can select to store the planning chart on a local drive or a network location.

2. Type or browse ... to the folder on the server to store planning charts, and verify that the folder is secure - accessible to the EChart sever ***but not to HTTP requests***. If you are in doubt about the security, contact your IT administrator.

3. Click **OK** to save the specified folder and return to the planning chart.

Additional Organizational Model Planning Tasks

Selecting Planning Chart Options

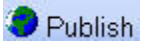
When you choose to publish a chart with organizational planning or succession planning enabled (OrgPublisher Premier), you can select additional features specifically for planning charts.

1. Follow the Publishing Wizard dialogs until you reach the enable planning dialog. Select either or both planning options, **Organizational Planning** or **Succession Planning**.
2. Select the **Enable revision history** check box if you want to provide a history of revisions, user ID, and, if supplied, any comments made by the user.
3. Select the **Require that all planning charts be password protected** check box if you want to password protect the planning chart.
4. Select the **Show visual indicator for changes** check boxes if you want to use a visual marker in chart boxes that have been added, moved, or edited.
5. Select the **Set default options for change report** check box if you want to generate a change report or export change data.
6. Continue with the *Publishing Wizard*.

Enabling a Visual Change Indicator in the Planning Chart

The Show Change icon  is a visual indicator that change has occurred in the planning chart (OrgPublisher Premier). The chart administrator determines if this feature is enabled in a planning chart. The planner decides whether or not to display the icons.

The change icon appears as a small pencil icon in the upper right-hand corner when a chart box has been moved, added, or edited.

1. Click the Publish button 

in the toolbar. You can also select **Tools** in the Main menu then **Publishing Wizard** from the options list. If this is the first time you are publishing a chart, the wizard opens to the first dialog which gives you a brief overview of the *Publishing Wizard*.

2. Follow the dialog prompts, choosing to publish a planning enabled chart, until you reach the dialog allowing choices for the planning chart.

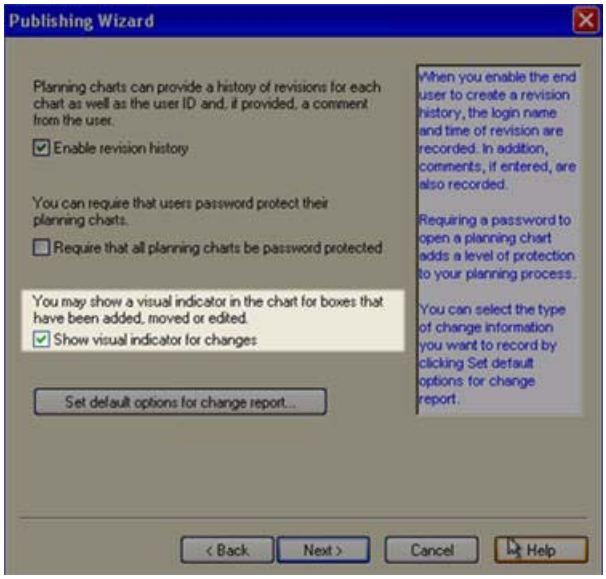

Publishing Wizard
Planning charts can provide a history of revisions for each chart as well as the user ID and, if provided, a comment from the user.
Enable revision history
You can require that users password protect their planning charts.
Require that all planning charts be password protected
You may show a visual indicator in the chart for boxes that have been added, moved or edited.
Show visual indicator for changes
Set default options for change report...
When you enable the end user to create a revision history, the login name and time of revision are recorded. In addition, comments, if entered, are also recorded.
Requiring a password to open a planning chart adds a level of protection to your planning process.
You can select the type of change information you want to record by clicking Set default options for change report.
< Back
Next >
Cancel
Help

Figure 121

3. Select the **Show visual indicator for changes** check box.
4. Complete the Publishing Wizard and publish your chart.
5. In the planning chart, click **View** in the menu then **Show Change Icons**.

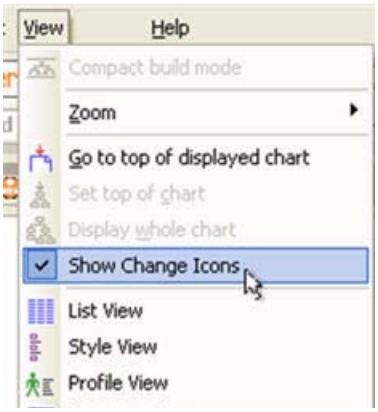


Figure 122

As changes are made in the chart, the icon appears (with a hover tool tip) when:

– a box has been moved
– box data has been modified
– a box has been moved and edited
– a box has been added

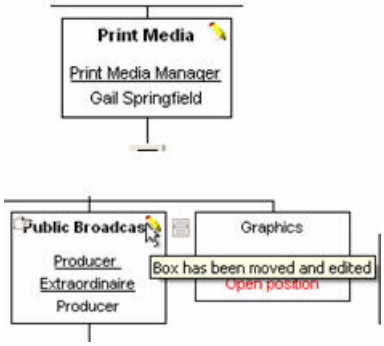


Figure 123

Assigning Group Access to Planning Charts

When you enable org model planning in OrgPublisher Premier and choose to require a password to open the charts, you can assign group access at two different levels.

During the publishing process, the Publishing Wizard prompts you to select a group that you want to create, view, and modify charts beginning or beneath their box in the chart. ***This means that when the selected group opens the planning-enabled chart, they can create and modify planning charts only from that point and below in the hierarchy***.

You can also select a group that you want to create planning charts for the entire hierarchy. This means that, based on where you have placed the top of the chart in the planning-enabled chart, the selected group can start their planning charts anywhere within the hierarchy.

1. Follow the **Publishing Wizard** until you reach the dialog allowing you to **select groups** to access your OrgPlan chart.

2. Use the first down-arrow to select a group that can create a planning chart **beginning at or under the group member's box**.

3. Use the second down-arrow to select a group that can create a planning chart **from any area of the hierarchy**.

4. Click **Next** and complete the Publishing Wizard.

Planners will be able to create a new planning chart, modify an existing chart, or delete a planning chart. Planners can modify any data fields displayed in the Chart View. Data fields you want to keep in the chart, but do not want modified can be displayed in the Profile View. And since planners cannot add or delete custom fields, you still maintain control over the custom fields you decide to use in the chart.

Setting Levels for Planning Charts

When creating a new planning chart (OrgPublisher Premier), you can determine how many levels to allow in the planning chart.

1. In the published planning enabled chart, click the Organizational Planning button 

. This button may vary, depending on whether or not Succession Planning has been enabled.
If planning charts exist, the *Planning Charts* dialog opens with a list of existing planning charts. Click the New button 

.
If no planning charts currently exist, the *New Planning Chart* dialog opens automatically.

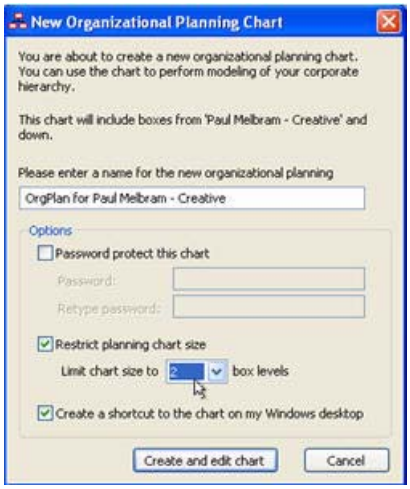

New Organizational Planning Chart
You are about to create a new organizational planning chart. You can use the chart to perform modeling of your corporate hierarchy.
This chart will include boxes from 'Paul Melbram - Creative' and down.
Please enter a name for the new organizational planning
OrgPlan for Paul Melbram - Creative
Options
Password protect this chart
Password:
Retype password:
Restrict planning chart size
Limit chart size to
box levels
Create a shortcut to the chart on my Windows desktop
Create and edit chart
Cancel

Figure 124

2. Select the **Restrict planning chart size** check box.

3. Use the down-arrow to select the number of levels you want to **Limit chart size** to field.

4. Continue creating the planning chart.

Using Advanced Box Layout with Organizational Model Planning

The chart administrator can now use the *Advanced Box Layout Editor* to format charts for planning (OrgPublisher Premier) purposes.

When editing within a planning chart, you may need to select a box which, in turn, selects the span of control beneath that box. Because *Advanced Box Layout* formats allow the placement of the name or job title at the top of the box, a selection button has been added.

Note: *The administrator **must change the Open position label position type** in the source chart if you want to allow planners to modify the field. You can change the name to read Open position instead.*

When the user places the mouse pointer over the top right corner of the box, the selector is available  . When this is visible, click to select the box and its span of control.



Figure 125


Paul Melbram
Hired
06/29/1999
Salary
$99,000
Grade
A11
E/N
E
Appraisal Date/Score
06/29/2007
4
Readiness
40
Creative Vice President
CREATIVE
Brandi Nelson
Hired
05/01/1994
Salary
$71,000
Grade
A8
E/N
E
Appraisal Date/Score
05/01/2007
4
Readiness
40
Creative Director
CREATIVE PRINT

Figure 126

OrgPlan for Planners

How to Get Started with Organizational Planning Charts

Planning charts, available in OrgPublisher Premier, work with a special menu and toolbar, and are ***always in Build Mode***. *Build Mode* does not reflect special formatting, such as multi-level peer display or reports in the same box as their manager. The menu and toolbar offer several options which enable planners to modify planning charts, as well as generate a change report or view a revision history.

Planners can modify any data fields displayed in the Chart View. Data fields in the Profile View only cannot be modified. So the chart administrator can maintain control over the custom fields in the chart, planners cannot add or delete custom fields.

The Organizational planning toolbar includes the following buttons.

Menu option / Button	Action
File	Enables you to **Save** you planning chart, as well as use **Print**, **Print preview**, and **Print setup** features. The **Print options** feature allows you to choose to print views (depending on the views available in the chart), header and footer information and select or clear the Print Wizard. **Preferences** allows you to select the location to store your planning charts, either a local or network drive.
Report	Enables you to generate and customize a change report, as well as view a history of revisions in the planning chart, or send the planning chart to another user.
Edit	Enables you to **Cut**, **Paste**, **Rename**, or **Delete** components in the chart. In addition, you can Undo changes made or open the *Search* dialog or go directly to the **Groups** tab of the *Search* dialog.
View	Enables you to perform several functions, including opening views (if available) in the planning chart, work in the *Compact Build Mode*, or enable or disable the drilling buttons. In addition, you can set the top box in the planning chart, go to the top of the displayed chart, display the whole chart, display or hide the Main Toolbar or Text Buttons, and select the head count information to display in the Status Bar.

Menu option / Button	Action
Insert	Enables you to insert the standard components in the planning chart, such as a **Person**, **Job**, **Box**, and more.
Help	Enables you to access the Help file for OrgPlan, as well as view information about the OrgPublisher version and license.
	Click this button to view information about the version of OrgPublisher you are using.
	Saves the chart. If this is a new chart, the *Save As* dialog displays so that you can assign a name to the file.
	Click this button to open the *Email OrgPlan* dialog to send the planning chart, change report, or both to another user.
	Click this button to generate and open the change report in HTML format.
	The Cut button sends the selected text or object to the clipboard and deletes the text or object from the screen.
	The paste button copies the contents of the clipboard to the screen.
	Reverses, the latest action. May be repeated to undo additional actions. You can undo content-related changes, such as adding, deleting, moving, and copying information.
	Prints the chart. Prints a specific chart view if it is selected in **Print Options** or the Print Wizard dialog.
	Displays the chart as it will look when you print it and is only available in the Chart View.
	Opens the system *Print Setup* dialog.
	Displays the chart as it will look in Microsoft® PowerPoint and is only available in the *Chart View*.
	Click this button to move the *Chart View* to the top center of the displayed drilling level.
	Use this field to enter your basic toolbar search text. Searches are based on text you enter in the toolbar field or select from the drop-down list, if previous toolbar searches have been performed. You can type one or two words, such as first name and last name. Searches all fields one field at a time.
	Click this button to display the *Search* dialog at the **Name** tab.

Menu option/Button	Action
	The editing mode in which everything except the employee name is hidden; provides an easy-to-view, compact chart to facilitate dragging and dropping boxes.
	Click this button to set the zoom percent for the chart display.
	Click this button to display the chart from the highest box in the hierarchy.
	Click this button to select the number of levels from the drop-down list that you want to display.
	Click to open the *Select Style* dialog to choose a layout style for the planning chart. Click on a layout for additional information.
	Click this button to insert a box containing an open position.
	Inserts a box containing person and job fields into the chart.
	Inserts a box into the chart.
	Inserts an open position field into a box in the chart.
	Inserts a person field into a box in the chart.
	Inserts a job field into a box in the chart.
	Inserts an assistant box into the chart.
	Inserts a partner box into the chart.
	Click this button to open and close the Style View, which displays the styles available for the open chart.
	Click this button to open and close the Tree View, which displays the chart in an outline format. Click on a position or name to locate it in the chart.

Menu option / Button	Action
	Click this button to open and close the List View, which lists employees in the chart. The view contains two panes. One pane lists only the employees in the portion of the org chart that is shown. The **List View** pane shows custom information such as telephone numbers and office locations and is used as the index for a chart printed in Book style format. You can click on a name in this list to locate it in the chart. Columns can be sorted. The **Search View** pane enables you to conduct a search for specific information, and to create and save a new group. Click on a name in this list to locate it in the chart. The Search View can, typically, also list everyone in the chart. Columns can be sorted.
	Click this button to open and close the Profile View, which displays information about an employee or position, including custom fields that are defined for that position type.
	Click this button to open and close the Summary View, which displays summary fields and totals by position type and group.
	Click this button to open and close the *9 Box Matrix*, which displays employees on a **Y** and **X** axis, based on performance and potential ratings.
	Starts the context-sensitive portion of the help system. Click the Help button then click a toolbar button or inside a wizard for additional information.

With planning charts, if enabled by your administrator, you can also:

Use procedures found in New with This Version

Drag and Drop from Search View in Planning Charts or Drag and Drop from 9 Box Matrix in Planning Charts

Generating a Change Report

Generating a Revision History

Inserting Chart Components

Moving Boxes, Moving People, Moving Boxes with Cut and Paste

Previewing a Book Style Chart or Previewing a Wall Style Chart

Printing Your Chart as a Book, Printing in Wall Chart Style

Saving and Charting Search Results as a Group

Displaying Chart Styles

Sending the Planning Chart to Another User

Setting Chart Layout Options

Setting Change Report Default Options

Storing Planning Charts

Work with Views

- 9 Box Matrix View
- List View
- Profile View
- Search View
- Creating a Side-by-Side Profile View
- Summary View
- Tree View

Changing a Planning Chart Job Title and Position Type

When working with a planning chart (OrgPublisher Premier), you can change job titles or position types.

1. Double-click on the job title in the *Chart View*. The *Rename Job Title* dialog opens.
2. Type the new title over the old one.
3. You can also modify the **Position type** by selecting from the list.
4. Click **OK**. The new title and position type, if applicable, display in the chart box.

Changing a Person's Position Type in Planning Charts

When working with a planning chart (OrgPublisher Premier), you can change position types.

1. Double-click on the person's name in the *Chart View*. The *Update Person* dialog opens.

2. Double-click the new **Position type** you want to use. The *Update Person* dialog closes and the new position type is accepted. You can also select the new position type from the list, then click **OK**.

Drag and Drop from 9 Box Matrix in Planning Charts

You can drag a person's name from the 9 Box Matrix View, available in OrgPublisher Premier, and drop it into the org model planning chart or succession planning chart.

1. Once the *9 Box Matrix* is created, click the name you want to add to the chart and hold down the mouse button.
2. Drag the cursor to the target box in the chart.
3. When the cursor is over the field where you want to drop it, release the mouse button.

   If you are working with org model planning, the name replaces the name in the target box. If you are working with succession planning, the name is added as a, or replaces the existing, successor.

Drag and Drop from Search View in Planning Charts

You can drag a person's name from the Search View and drop it into the org model planning chart or succession planning chart (OrgPublisher Premier).

1. After you conduct your search, click the name you want to add to the chart and hold down the mouse button.
2. Drag the cursor to the target box in the chart.
3. When the cursor is over the field where you want to drop it, release the mouse button.

   If you are working with org model planning, the name replaces the name in the target box. If you are working with succession planning, the name is added as a successor, or replaces the existing successor.

Exporting Change Data

When you generate change reports you can choose to export data that has changed in order to create a comma separated file reflecting changes to upload into a source HR system. You select the desired fields, and the resulting Microsoft Excel file contains three tabbed worksheets:

- Added position data records
- Removed position data records
- Edited data records (field data modified or movement in the chart)

1. In the planning chart, select **Report** from the menu then **Generate change report** from the options list. You can also click the Generate a change report button  in the toolbar.

   In the OrgPublisher application chart, select **Tools** from the menu then **Compare two charts** from the options list. Follow the Comparing Two Charts procedure to generate the report.

   The *Change Report Options* dialog opens.

2. In the **Generate Report** tab, select the report data you want to see then click the **Export Change Data** tab.

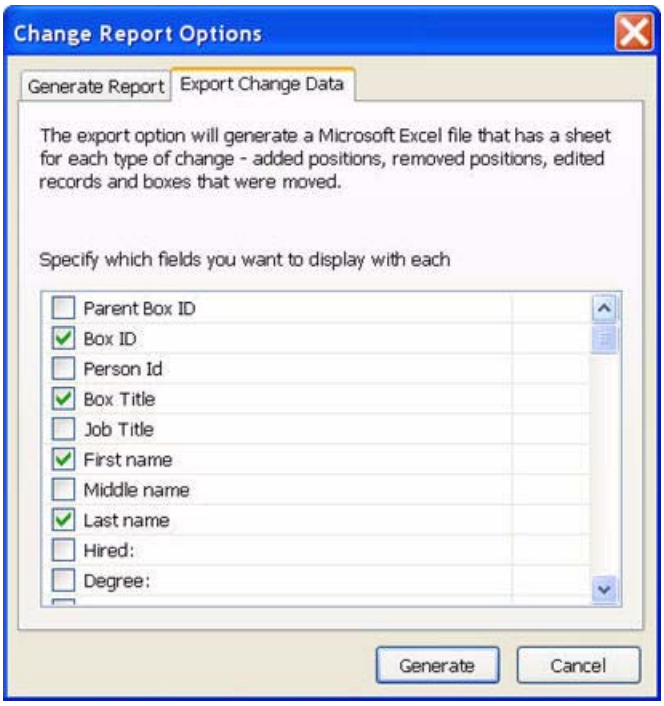

Change Report Options
Generate Report
Export Change Data
The export option will generate a Microsoft Excel file that has a sheet for each type of change - added positions, removed positions, edited records and boxes that were moved.
Specify which fields you want to display with each
Parent Box ID
Box ID
Person Id
Box Title
Job Title
First name
Middle name
Last name
Hired:
Degree:
Generate
Cancel

Figure 127

3. Select the fields you want to see in each summary section of the report, such as position types or groups.

Note: *Parent Box ID must be one of the selected fields in order to see the current and previous Parent Box ID data for a changed record.*

4. Click **Generate**. If you selected to **View report in web browser**, the browser displays a basic HTML report that summarizes the changes made in the chart using **Before** and **After** columns, as well as the **Change percent**.

   The HTML file is saved to your local drive in the in the **Local Settings/Temporary** folder. You can also save the report by using the browser **File>Save As** option.

   If you selected **View report in Microsoft Excel**, both the report sheet and export data sheets open with the 3 tabbed sheets.

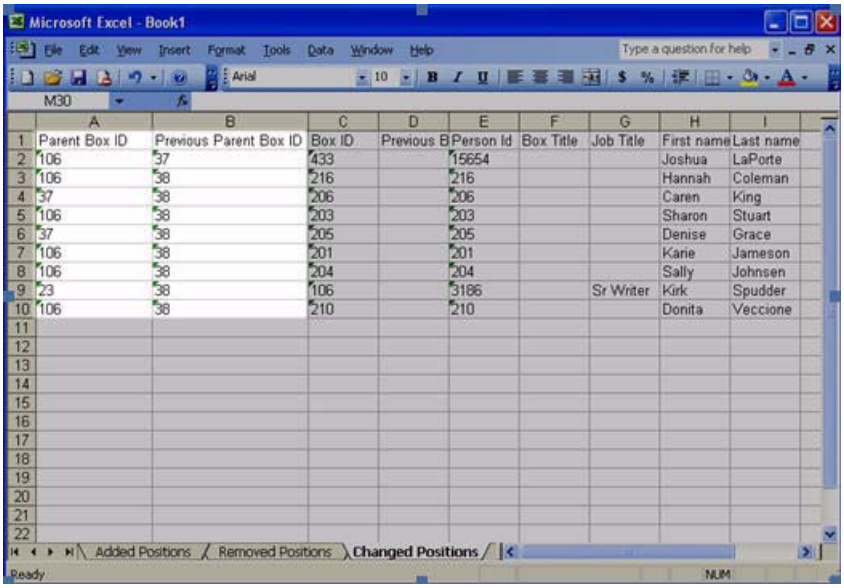

Microsoft Excel - Book1
File Edit View Insert Format Tools Data Window Help
Type a question for help
Arial 10
M30
Parent Box ID | Previous Parent Box ID | Box ID | Previous B | Person Id | Box Title | Job Title | First name | Last name
106 37 433 15654 Joshua LaPorte
106 38 216 216 Hannah Coleman
37 38 206 206 Caren King
106 38 203 203 Sharon Stuart
37 38 205 205 Denise Grace
106 38 201 201 Karie Jameson
106 38 204 204 Sally Johnsen
23 38 106 3186 Sr Writer Kirk Spudder
106 38 210 210 Donita Veccione
Added Positions
Removed Positions
Changed Positions
Ready
NUM

Figure 128

See the Setting Change Report Default Options procedure for more information.

Generating a Change Report

When working with Organizational planning charts, available in OrgPublisher Premier, you can also create customized change reports .

Change reports show the differences in a chart from one point in time to another.

1. In the OrgPlan chart, select **Report** from the menu then **Generate change report** from the options list. You can also click the Generate a change report button  in the toolbar.

   In the OrgPublisher application chart, select **Tools** from the menu then **Compare two charts** from the options list to open the *Compare Charts* dialog. Follow the Comparing Two Charts procedure to generate the report.

2. The browser displays a basic HTML report that summarizes the changes made in the chart using **Before** and **After** columns, as well as the **Change percent**.

3. The HTML file is saved to your local drive in the in the **Local Settings/Temporary folder**. You can also save the report by using the browser **File>Save As** option.

4. You can also export the changed information by selecting the **Export Change Data** tab.

   If you want to view detailed information in your change reports, see the Setting Change Report Default Options procedure in this document.

Generating a Revision History

With OrgPublisher Premier you can create a revision history when modifying web-based planning charts. After you have modified an OrgPlan chart, or have been sent a modified planning chart, you can see who modified the chart on what day the modification occurred.

1. In the planning chart, select **Report** from the menu then **View revision history** from the options list.

2. The browser displays a basic HTML page with the revision information. The **User** and **Date** fields are automatically recorded. A **Comment** is entered as an option and may or may not be available.

3. You can use the browser menu to save the revision history, copy and paste it into another application, or send it to someone via an email message.

Selecting a Planning Chart Style

Click the Select Style button in the toolbar to open the *Select Style* dialog to choose a layout style for the planning chart (OrgPublisher Premier). Click on a layout for additional information.

Chart Layout	Description
	**Layout 1** **Horizontal** - Lowest level of each branch in the chart is arranged in a horizontal line. This creates shorter, wider charts.
	**Layout 2** **Vertical** - Lowest level of each branch in the chart is arranged in a vertical row. This creates narrower, taller charts.
	**Layout 3** **Side by side** - Lowest level of each branch in the chart is arranged with the boxes side by side. This creates more compact charts.
	**Layout 4** **Stacked** - Lowest level of the chart (displays only two levels) is arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level. The number of boxes across is determined automatically or set to a specific number.

Sending the Planning Chart to Another User

You can send your planning chart (OrgPublisher Premier) and the change report to another approved user via email.

1. In the planning chart, select **Report** from the menu then **Send chart to another user** from the options list. You can also click the Send chart to another user button  in the toolbar. The *Email OrgPlan* dialog opens.
2. Select the radio button that matches what you want to do, **Send chart and a change report**, **Send chart only**, or **Send change report only**.
3. Click **OK**. Your email client opens a message with the attachments in the email. The planning chart file attachments include an **OCP** and **HTM** file.
4. Type the email address or addresses to which you would like to send the attachments. Click **Send**.

Setting Change Report Default Options

With OrgPublisher Premier you can choose to **Enable Organizational Planning** or **Enable Succession Planning** in the Publishing Wizard, as well as select the default options for the planning chart change report.

1. Follow the *Publishing Wizard* until you reach the dialog concerning the planning chart revision history. Click **Set default options for change report**. You can access the change report from the planning chart **Report/Generate change report** menu option. The *Change Report Options* dialog opens.

2. In the **Generate Report** tab, the **Generate summary** section enables you to choose the areas to summarize in the report. Check box options include:

Summary	Description
Create summary section	
Show position type summaries	Select this check box to display a summary of changes made to each position type in your planning chart.
Show group summaries	Select this check box to display a summary of changes made to each group in your planning chart.
Show differences in summary fields	Select this check box if you want to display changes made to each summary field in the OrgPublisher Premier planning chart.
Show differences for every manager	Select this check box if you want to display changes made to each summary field for each manager in the OrgPublisher Premier planning chart.
Show summary section for each manager	Select this check box if you want to show the detail for added or removed reporting relationships for each manager in the planning chart.
Specify how you want to show people's names in	Click the drown-arrow to select box title, job title, or customize.

3. You can customize the display of names by selecting the **Specify how you want to show people's names in the** check box.
   – If you select **Custom**, the *Custom Name Format* dialog opens and you can build the desired format.

- By default the **Box title** and **Name** are loaded into the Custom name format: **box**. To remove these, select the text in the list and press the **Delete** key on your keyboard.
- Scroll through the list to locate the first field you want to display.
- Double-click on the field to place it in the **Custom name** format field: **box**. You can also type the field information between the $ character.
- To add a second field, scroll to locate and then double click on the field. A hyphen (-) will separate be added to separate the fields of data.
- Sample output displays in the **Example of this format** section.

  Click **OK** to close the *Custom Name Format* dialog.

4. In the **Where to view the report** section, you can select the **View report in web browser** or **View report in Microsoft Excel** radio button. Click **OK** to accept your selections.

5. Follow the Exporting Change Data procedure to send the report to a spreadsheet.

6. Click **Next**, and continue the publishing procedure.

Updating an Open Position in Planning Charts

You can update a position type in a planning chart (OrgPublisher Premier).

1. Double-click on the open position in the Chart View. The *Update Person* dialog opens.

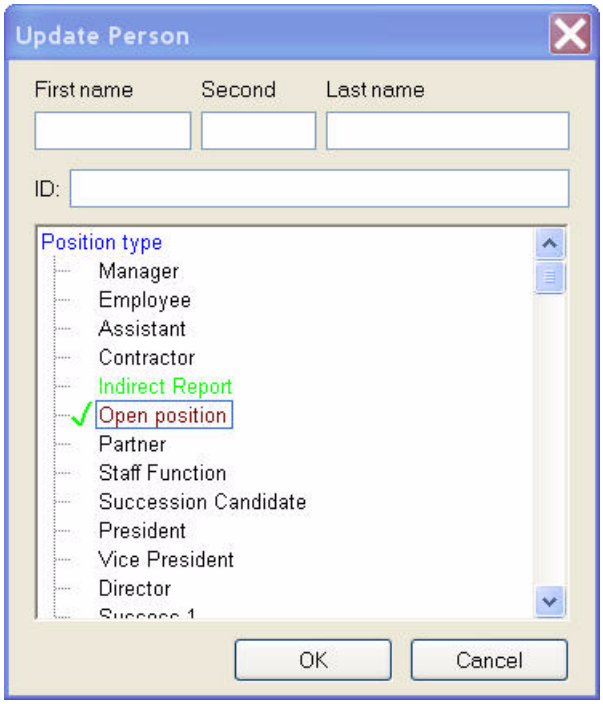


Figure 129

2. Type the **First name** and **Last name** of the person filling the open position.
3. Select the appropriate **Position type** from the list.
4. Click **OK**. The new position type and name display in the chart box .

CHAPTER 12

WORK WITH SUCCESSION PLANNING

Succession Planning for Administrators

Note: *If you renewed maintenance from a previous OrgPublisher Enterprise version that included the organizational planning client, that feature is included in the OrgPublisher 9 version.*

Verify that you have satisfied the special considerations when building a succession chart from either a single data field or multiple data feeds.

It is recommended that you do not combine the Succession planning and Organizational planning features as unexpected results may occur. Succession planning is designed to help you match people to specific positions with no hierarchical information involved. OrgPlan is designed as an organizational modeling tool based on a hierarchy.

When you create a planning chart, verify that the box you have selected as top of chart is correct. Once the planning chart is created, drilling up from the designated top of chart is not available.

Planning charts do not contain a separate My groups tab in the Search View. If you already have groups in the My groups tab in the PluginX chart however, those groups are copied to the planning chart.

Planners may encounter an error when sending a planning chart created on a local machine using Microsoft Vista. It is recommended that administrators use a secured server location.

If you save multiple planning charts to the same web folder, you should specify separate storage folders in order to maintain user name and password security.

If you disable the Main toolbar while using the Publishing Wizard, the OrgPlan and Succession Plan options are not available in the published chart.

When formatting successor fields, be aware that using lighter colors, such as pale blue or white, may make it difficult to see the text in the chart boxes or views.

Working with Succession Planning

With OrgPublisher Premier, you can publish a web-based chart for succession planning as well as org model planning. This topic covers succession planning, see the Working with Organizational Planning Charts for details about organizational planning charts.

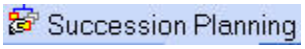
Planning administrators can create a new succession planning chart, modify an existing chart, or delete a planning chart. Selected individuals, or planners can create and share succession charts. Special formatting is automatically assigned to successor position types by OrgPublisher.

Planners can modify any data fields displayed in the Chart View. Data fields administrators want to keep in the chart, but do not want modified, can be displayed in the Profile View. And, since planners cannot add or delete custom fields, administrators still maintain control over the custom fields you decide to use in the chart.

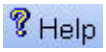
Administrators enable planning charts while using the Publishing Wizard, and can customize change report options, enable the revision history, or password protect planning charts. If your chart contains photos, it is best to hide the photos for your planning chart. The administrator or specified group member can then create a planning chart using the Planning button.

Before starting the *Publishing Wizard*, please review Preparing to Publish Chart with Succession Planning.

The planning enabled published chart toolbar includes the following buttons.

Button	Action
	Click this button to view information about the version of OrgPublisher you are using.
	Saves the chart. If this is a new chart, the *Save As* dialog displays so that you can assign a name to the file.
	Button available in planning enabled published charts. Click to view the **Planning** charts menu. Options include **Create a new planning chart**, **Open planning chart**, and **Delete planning chart**.
	The Cut button sends the selected text or object to the clipboard and deletes the text or object from the screen.

Button	Action
	Prints the chart. Prints a specific chart view if it is selected in **Print Options** or the Print Wizard dialog.
	Displays the chart as it will look when you print it and is only available in the Chart View.
	Opens the system *Print Setup* dialog.
	Displays the chart as it will look in Microsoft® PowerPoint and is only available in the *Chart View*.
	Click this button to move the *Chart View* to the top center of the displayed drilling level.
	Click this button to display the *Search* dialog at the **Name** tab.
	Use this field to enter your basic toolbar search text. Searches are based on text you enter in the toolbar field or select from the drop-down list, if previous toolbar searches have been performed. You can type one or two words, such as first name and last name. Searches all fields one field at a time.
	Click this button to make a selected box the center of the chart display.
	Click this button to set the zoom percent for the chart display.
	Clicking this button designates the selected box as the top of your chart for the selected style.
	Click this button to display the chart from the highest box in the hierarchy.
	Click this button to enable the drill buttons in your chart which facilitate navigation between shown and hidden levels.
	Click this button to select the number of levels from the drop-down list that you want to display.
	Click this button to open and close the Style View, which displays the styles available for the open chart.
	Click this button to open and close the Tree View, which displays the chart in an outline format. Click on a position or name to locate it in the chart.

Button	Action
	Click this button to open and close the List View, which lists employees in the chart. The view contains two panes. One pane lists only the employees in the portion of the org chart that is shown. The **List View** pane shows custom information such as telephone numbers and office locations and is used as the index for a chart printed in Book style format. You can click on a name in this list to locate it in the chart. Columns can be sorted. The **Search View** pane enables you to conduct a search for specific information, and to create and save a new group. Click on a name in this list to locate it in the chart. The *Search View* can, typically, also list everyone in the chart. Columns can be sorted.
	Click this button to open and close the Profile View, which displays information about an employee or position, including custom fields that are defined for that position type.
	Click this button to open and close the Summary View, which displays summary fields and totals by position type and group.
	Click this button to open and close the 9 Box Matrix View, which displays employees on a **Y** and **X** axis, based on performance and potential ratings.
	Click this button to open the help file.

With planning enabled charts, you can:

Copying a Link to a Person in the Chart

Creating a New Succession Planning Chart

Deleting a Planning Chart

Modifying Successor Fields

Opening a Planning Chart

Previewing a Book Style Chart or Previewing a Wall Style Chart

Printing Your Chart as a Book or Printing in Wall Chart Style

Sending the Planning Chart to Another User

Storing Planning Charts

Succession planning charts can be saved to the end user's local hard drive or to your web server in a subfolder automatically created by OrgPublisher. If you elect to use a web server, you can use the EChart options to add security to the planning charts. End users can see a list of planning charts created by themselves and their subordinates. Administrators can password protect the planning chart and, if more than one user tries to open the same chart, a message notes that someone else is modifying the chart and a read-only option is available.

Once a succession planning chart is opened, a special menu and toolbar are available. Planning charts are ***always in Build Mode***. *Build Mode* does not reflect special formatting, such as multi-level peer display or reports in the same box as their manager. The menu and toolbar offer several new options to end users which enable them to modify and save planning charts, as well as generate a change report or view a revision history.

See the How to Get Started with Succession Planning topic for more information. In addition, several planning chart provisions apply.

Preparing to Publish Chart with Succession Planning

In OrgPublisher Premier, you can use any chart you have created as the source chart for Succession Planning. When a person is moved in a succession planning chart, they automatically become a Successor position type (**Successor 1**, **Successor 2**, **Successor 3**).

You should create formats for the Successor position type in the source chart. This might include:

- Format the name text differently for the Successor position type.
- If *Advanced Box Layout Editor* is used, format the Successor position type to display a different background color.
- Create a group for anyone who is a Successor position type and apply a group icon to display in the chart.

Enabling the Succession Planning Features

If you have selected this option in OrgPublisher Premier and you are the chart administrator, you can choose to enable or disable succession planning features in your chart.

1. Click **Options** from the OrgPublisher menu then **Search options** and **Customize Search dialog**. The *Customize Search Dialog* opens.

2. To create succession planning charts and search for succession candidates, select the **Enable succession planning features** check box. Clear the check box to disable these features.

3. Click **OK** to accept the changes and close the dialog.

Creating a Succession Planning Chart in the New Chart Wizard

Available in OrgPublisher Premier, OrgPublisher's succession planning feature enables you to create a chart specifically for analyzing potential successors to jobs in your company that you can publish to your intranet or the Internet, enabling planners to delegate successors to specific positions. Special formatting is automatically assigned to successor position types by OrgPublisher.

1. Open OrgPublisher and select **Run the New Chart Wizard** radio button from the *OrgPublisher* dialog. You can also click **File** from the OrgPublisher Main menu then **New**, or click the New button  in the toolbar. The New Chart Wizard opens.

2. Select the **Succession planning chart** radio button then click **Next**.

3. Select the appropriate data source button then follow the dialog prompts to extract your data. Click **Next**.

4. Select the **Specify custom field order** radio button. Click **Next**.

5. In the *Data preview* dialog, map your fields. When you do this, OrgPublisher provides standard succession candidate fields in the drop-down list in the column headings.

6. Select the field that matches your data in each column. Duplicate usage of a field type is limited to custom fields. After you have mapped the fields, click **Next**.

7. If you select **Multiple data sources**, you are prompted to choose the corresponding data element from the **Link to** pull-down list before repeating Steps 3-6. See the Creating an Org Chart from Multiple Data Sources for more information.

8. Select a style template for the succession planning chart then click **Next**.

9. Click **Finish** to open the succession planning chart.

Mapping Succession Planning Fields

When you create a succession planning chart, available in OrgPublisher Premier, and you want to use fields that correspond to the standard succession candidate fields, you select the Specify custom field order option to map your fields. Verify that you have satisfied the special considerations when building a succession chart from either a single data field or multiple data feeds.

Before you create a succession chart or map your fields, you should:

- Match your data to OrgPublisher's Input File Layout.
- Review the input file rules.
- Review record types.
- Extract your data.

In the *New Chart Wizard Data Preview* dialog, you can match your data fields to the standard succession fields provided in OrgPublisher.

These standard fields include:

Field Number	Field Name	Description
50	**Key Person**	Standard succession candidate custom field; **Text** type field assigned at the position level.
51	**Location**	Standard succession candidate custom field; **Text** type field assigned at the person level.
52	**Age**	Standard succession candidate custom field; **Numeric** type field assigned at the person level.
53	**Salary**	Standard succession candidate custom field; **Currency** type field assigned at the person level.
54	**Performance Rating**	Standard succession candidate custom field; **Text** type field assigned at the person level.
55	**Education Level**	Standard succession candidate custom field; **Text** type field assigned at the person level.
56	**Skills**	Standard succession candidate custom field; **Text** type field assigned at the person level.
57	**Certifications**	Standard succession candidate custom field; **Text** type field assigned at the person level.

Field Number	Field Name	Description
58	**Competency Rating**	Standard succession candidate custom field; **Text** type field assigned at the person level.
59	**Successor Rank**	Standard succession candidate custom field; **Numeric** type field assigned at the person level.
60	**Designated Successor**	Standard succession candidate custom field; **Text** type field assigned at the person level.
61	**High Potential Rating**	Standard succession candidate custom field; **Text** type field assigned at the person level.
62	**Readiness**	Standard succession candidate custom field; **Text** type field assigned at the person level.
63	**Retention Risk**	Standard succession candidate custom field; **Text** type field assigned at the person level.
64	**Impact of Loss**	Standard succession candidate custom field; **Text** type field assigned at the person level.

These succession custom fields can be used to help create succession candidate groups using the fields singly or in combinations.

Publishing a Chart for Succession Planning

At chart publishing time, the chart administrator can choose to enable one or both of the planning options available in OrgPublisher Premier. Once selected, the chart administrator is taken through the wizard dialogs for planning charts.

1. Click the Publish button 

in the toolbar or the Publishing Wizard button  in the Wizard View. You can also select **Tools** from the Main menu then **Publishing Wizard** from the options list. The Publishing Wizard opens.

2. Select **Advanced Mode** and follow the wizard dialogs, selecting the **Interactive Org Chart** option then either the **PluginX** or **EChart Rich client** format.

3. In the *OrgPlan* dialog, select the **Enable Succession Planning** check box. Click **Next**.

4. If you want the succession planning chart to record the Windows NT user sign-on ID and a comment, if supplied, for each change, click the **Enable revision history** check box.

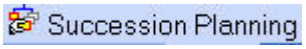
5. If you want succession planning charts password protected, click the **Require that all planning charts be password protected** check box.

6. If you want an indicator in the chart where changes have been made, select the **Show visual indicator for changes** check box.

7. If you want to select the defaults for the planning change report, click **Set default options for change report** to open the *Change Report Options* dialog. See the Setting Change Report Default Options procedure in this document for detailed information. Click **Next**.

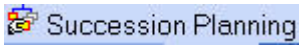
8. Select the context menu commands you want to make available in both the planning-enabled PluginX and planning charts by expanding each menu and selecting the options you want.

9. Click **Next** and continue with the publishing procedure.

10. When the chart is published, succession planning administrators click the Succession Planning button  in the toolbar. The *Succession Planning Charts* dialog opens.

11. To create a new chart, select **New**. See the *Creating a New Succession Planning Chart* procedure for more detailed information.

When the chart is published, the planning administrator sees one of the following button options, based on the chart administrator's selection.

- Organizational Planning only is available - 
- Succession Planning only is available - 
- Organizational and Succession Planning are available -  - the Planning button options list displays when the button is clicked.

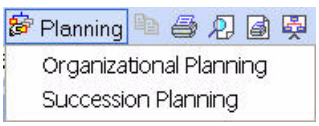
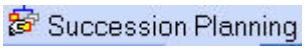


Figure 130

Additional SUccession Planning Tasks

Creating a New Succession Planning Chart

If published through OrgPublisher Premier, planning administrators can create a new succession planning chart, modify an existing chart, or delete a planning chart. When in succession planning chart end users can add and remove successors from the chart but cannot change the chart structure.

1. Open the planning-enabled chart in the web browser and click the Succession Planning button 

.
2. Select **Create new succession planning chart**. The *New Succession Planning Chart* dialog opens. If a current succession planning chart does not exist, the dialog opens as soon as you click the button.

   The dialog notes where the planning chart begins, such as "This chart will include boxes from (name) and down." For instance, your chart administrator may publish the chart for you to work from your box down.
3. Type a name for the chart if you do not want to accept the default.
4. If not already enabled by the chart administrator, you can select the **Password protect this chart** check box to require typing a password whenever the chart is opened.
5. Type the **Password** then **Retype password**.
6. If you want a shortcut to the planning chart to display on your desktop, select the **Create a shortcut to the chart on my Windows desktop** check box.

Note: *When running OrgPublisher Succession planning on Microsoft® Vista with Internet Explorer in Protected mode, this check box option does NOT contain the text "on my Windows desktop." Instead, OrgPublisher stores the shortcut at: %USERPROFILE%\AppData\LocalLow.*

7. Click **Create and edit chart**. The browser opens the succession planning chart with the Insert toolbar, the Generate a change report  , and email  buttons enabled. See the Generating a Change Report procedure for detailed information.

   The planning chart saves to the folder specified when the original chart was published. PluginX planning charts can be saved to the

local hard drive or the web server. See the Storing Planning Charts topic for additional information.

Enabling the Change Icon Display

You can determine if you want to display the change icon in the planning chart (OrgPublisher Premier) box as changes are made.

1. Select **View** in the Main menu.
2. If there is a check mark beside **Show Change Icons**, then click the check mark to clear it.

   This closes the menu and removes the displayed change icons in the chart boxes.
3. If there is no check mark and you want to display the change icon, select **Show Change Icons**.

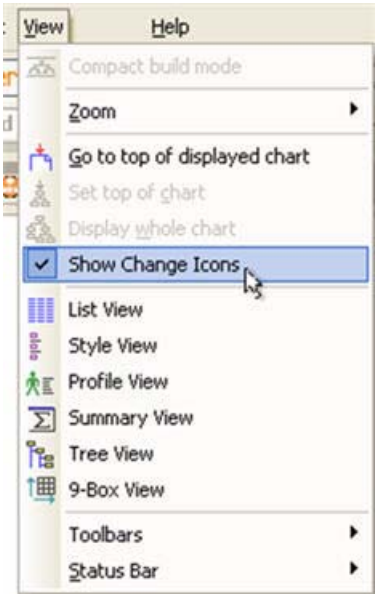


Figure 131

Searching Succession Candidates

When working with a succession planning chart (OrgPublisher Premier), you can search for succession candidates using the *Search* dialog or Search View. When succession planning is enabled, the search feature

includes searches for **Successor(s) in a box** and **Person succession count**.

For general searching information, see the Searching All Fields topic.

Searching for successors in a box

This search option provides a list of people in a box containing a selected number of successors, and helps you locate where you have no successors or too many successors for a specific position.

1. Open the *Search* dialog by selecting **Edit** from the menu bar, then **Search** from the pull-down options, or open the **Search View** pane in the List View. You can also click on the Search button  in the toolbar.

2. If you have selected a specific box in the Chart View, the *Search* dialog selects the **Search under selected box** check box. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under selected box** check box to clear it.

3. If you are using the Search View and want to start your search from a specific box in a chart, you must first select a box in the *Chart View* and then select the **Search under** check box. This begins the search at that point in the chart.

4. Select the **All Fields** tab.

5. In the **Search** field, click the drop-down arrow to select **Successor(s) in a box**. You can also press the key of the first letter of the field you want to navigate through the list.

6. In the **For** field, type the number of successors in a box you want to find. For instance, if you want to see all boxes that contain more than one successor, type 1.

7. In the **Match** field, click the down-arrow to select **=Equal to**.

8. Click **Search Now** or Go  . OrgPublisher performs the search and displays the matching records, successors and managers in the box in the lower pane.

9. You can save the search results as a group or perform an additional search.

Searching for person succession counts

The **Person succession count** uses the employee ID and position type of **<SC>** to determine if a person is slated for more than one position. Your organization may want to see everyone slated for more than one position. You may also want to create groups showing people slated for 2 positions, 3 positions, etc.

Note: *The results show only the <SC> record, not an entry for the successor's standard position. In addition, this is a compound search. The Person succession count search option first goes through the data to find all <SC> records in the chart. The resulting <SC> records are searched a second time is to see if any employee IDs appear on the list more than once.* ***Accurate employee IDs for each record must exist in your data in order to use this option.***

1. Open the *Search* dialog by selecting **Edit** from the menu bar, then **Search** from the pull-down options, or open the **Search View** pane in the List View. You can also click on the Search button 

in the toolbar.
2. If you have selected a specific box in the Chart View, the *Search* dialog selects the **Search under selected box** check box. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under selected box** check box to clear it.
3. If you are using the Search View and want to start your search from a specific box in a chart, you must first select a box in the *Chart View* and then select the **Search under** check box. This begins the search at that point in the chart.
4. Select the **All Fields** tab.
5. In the **Search** field, click the drop-down arrow to select **Person successor count**. You can also press the key of the first letter of the field you want to navigate through the list.
6. In the **For** field, type the number you want to search on. For instance, if you want to see how many positions contain more than one successor, type the number 2.
7. In the **Match** field, click the down-arrow to select **>= Greater than or equal to**.
8. Click **Search Now** or Go 

. OrgPublisher performs the search and displays the matching records in the lower pane.

9. You can save the search results as a group or perform an additional search.

   Side by side profiles are limited to 6 at a time if you auto-pin the profiles in the Search View.

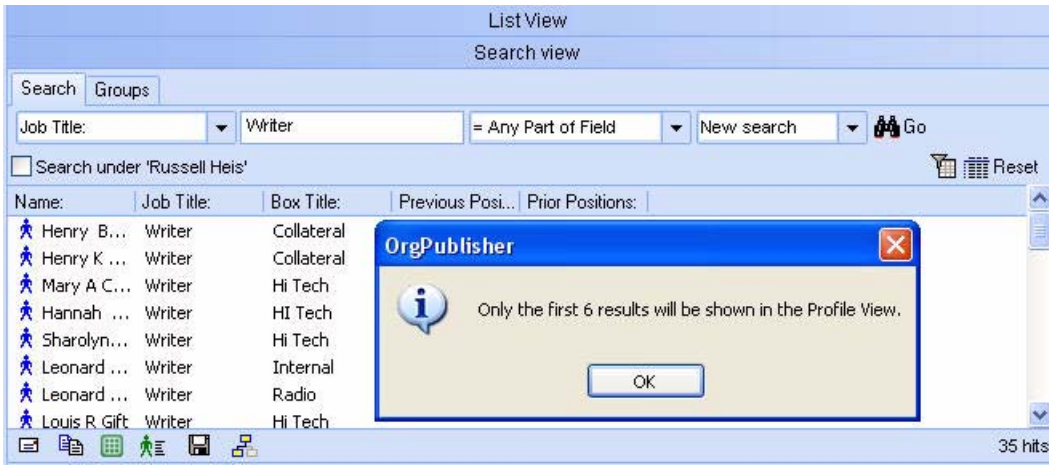


Figure 132

Spotlighting Succession Groups

You can use the spotlighting a group feature with succession groups (OrgPublisher Premier) you have created. You can use this feature alone or you can use it in conjunction with spotlighting search results.

Note: *The Spotlighting feature works only in View Mode.*

1. To enable the spotlight group feature, select a succession group to display in the chart from the Groups View.
2. Right-click on the group label in the Style Bar to view the options list.
3. Click **Group filter in chart** then **Spotlight boxes in group**.

The first example uses a succession group created to show people who are designated to succeed more than one position.



Figure 133

The second example uses a succession group created to find managers with no successors.



Figure 134

Note: *When printing a chart with the spotlighting feature enabled, if your printer does not support AlphaBlend, your printed chart will show all boxes as in the past. See your IT administrator if you have any questions.*

Using Succession Candidates in Groups

After you have created a group or groups with the results you require, you can use one of several options to indicate persons meeting the succession group criteria (OrgPublisher Premier). Some examples are:

Search Results for Succession Candidates

The first example uses a group created to show people who are **designated to succeed more than one position**.

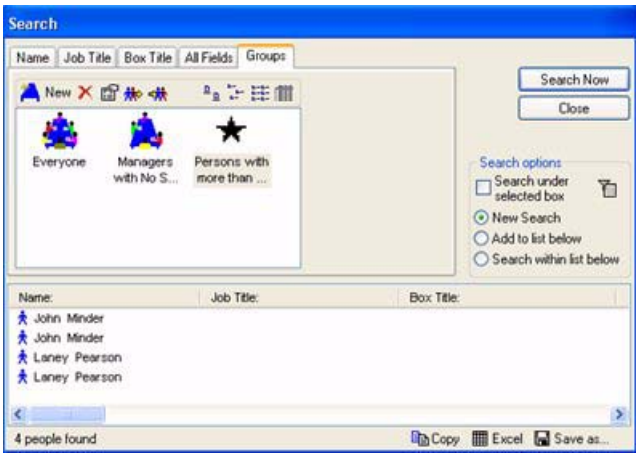


Figure 135

The second example uses a group created to find **managers with no successors**.

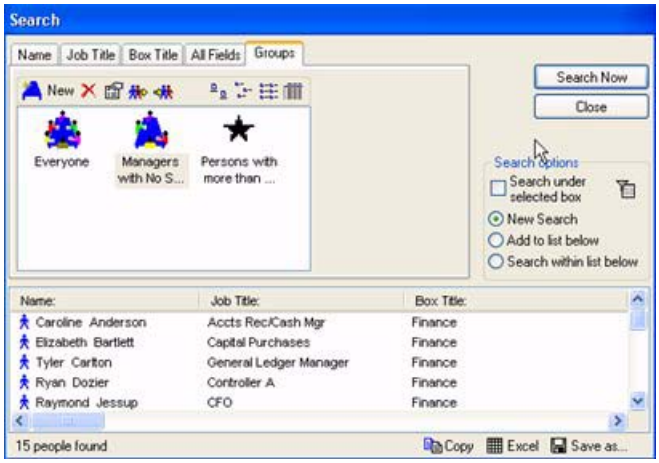


Figure 136

Using a Group Icon for Succession Groups



Figure 137

The above example uses a group created to show succession candidates who are designated to succeed more than one position.

Using a Multi-Report Icon for Succession Groups

Uses the employee ID to determine if a succession candidate is in the chart more than once. When the user clicks the icon, the Search View opens with a list of all occurrences of the person in the chart. If indirect reports are in the chart and the person is also a successor, the indirect role appears in the list.



Figure 138

Succession Planning for Planners

How to Get Started with Succession Planning

Planning charts, available in OrgPublisher Premier, work with a special menu and toolbar, and are always in *Build Mode*. *Build Mode* does not reflect special formatting, such as multi-level peer display or reports in the same box as their manager. The menu and toolbar offer several options which enable planners to modify planning charts, as well as generate a change report or view a revision history.

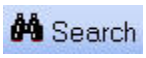
Planners can add or move successors using the Chart View. Other data fields cannot be modified. As the chart administrator, you can maintain control over other fields in the chart.

Note: *Initial formatting of the successor position type is handled in the default templates shipped with OrgPublisher.*

The Succession planning toolbar includes the following buttons.

Menu Option / Button	Action
File	Enables you to **Save** you planning chart, as well as use **Print**, **Print preview**, and **Print setup** features. The **Print options** feature allows you to choose to print views (depending on the views available in the chart), header and footer information and select or clear the Print Wizard. Preferences allows you to select the location to store your planning charts, either a local or network drive.
Report	Enables you to generate and customize a change report, as well as view a history of revisions in the planning chart, or send the planning chart to another user.
Edit	Enables you to **Cut**, **Paste**, **Rename**, or **Delete** components in the chart. In addition, you can Undo changes made or open the *Search* dialog or go directly to the **Groups** tab of the *Search* dialog.

Menu Option/Button	Action
View	Enables you to perform several functions, including opening views (if available) in the planning chart, work in the *Compact Build Mode*, or enable or disable the drilling buttons. In addition, you can set the top box in the planning chart, go to the top of the displayed chart, display the whole chart, display or hide the Main Toolbar or Text Buttons, and select the head count information to display in the Status Bar.
Help	Enables you to access the Help file for OrgPlan, as well as view information about the OrgPublisher version and license.
	Click this button to view information about the version of OrgPublisher you are using.
	Saves the chart. If this is a new chart, the *Save As* dialog displays so that you can assign a name to the file.
	Click this button to open the *Email OrgPlan* dialog to send the planning chart, change report, or both to another user.
	Click this button to generate and open the change report in HTML format.
	The Cut button sends the selected text or object to the clipboard and deletes the text or object from the screen.
	The paste button copies the contents of the clipboard to the screen.
	Reverses, the latest action. May be repeated to undo additional actions. You can undo content-related changes, such as adding, deleting, moving, and copying information.
	Prints the chart. Prints a specific chart view if it is selected in **Print Options** or the Print Wizard dialog.
	Displays the chart as it will look when you print it and is only available in the Chart View.
	Opens the system *Print Setup* dialog.
	Displays the chart as it will look in Microsoft® PowerPoint and is only available in the *Chart View*.
	Click this button to move the *Chart View* to the top center of the displayed drilling level.

Menu Option / Button	Action
	Use this field to enter your basic toolbar search text. Searches are based on text you enter in the toolbar field or select from the drop-down list, if previous toolbar searches have been performed. You can type one or two words, such as first name and last name. Searches all fields one field at a time.
	Click this button to display the *Search* dialog at the **Name** tab.
	The editing mode in which everything except the employee name is hidden; provides an easy-to-view, compact chart to facilitate dragging and dropping boxes.
	Click this button to set the zoom percent for the chart display.
	Click this button to display the chart from the highest box in the hierarchy.
	Click this button to select the number of levels from the drop-down list that you want to display.
	Click to open the *Select Style* dialog to choose a layout style for the planning chart. Click on a layout for additional information.
	Click this button to open and close the Style View, which displays the styles available for the open chart.
	Click this button to open and close the Tree View, which displays the chart in an outline format. Click on a position or name to locate it in the chart.
	Click this button to open and close the List View, which lists employees in the chart. The view contains two panes. One pane lists only the employees in the portion of the org chart that is shown. The **List View** pane shows custom information such as telephone numbers and office locations and is used as the index for a chart printed in Book style format. You can click on a name in this list to locate it in the chart. Columns can be sorted. The **Search View** pane enables you to conduct a search for specific information, and to create and save a new group. Click on a name in this list to locate it in the chart. The Search View can, typically, also list everyone in the chart. Columns can be sorted.

Menu Option/Button	Action
	Click this button to open and close the Profile View, which displays information about an employee or position, including custom fields that are defined for that position type.
	Click this button to open and close the Summary View, which displays summary fields and totals by position type and group.
	Click this button to open and close the 9 Box Matrix View, which displays employees on a Y and X axis, based on performance and potential ratings.
	Starts the context-sensitive portion of the help system. Click the Help button then click a toolbar button or inside a wizard for additional information.

Note: *In addition, several planning chart provisions apply.*

Planning charts do not contain a separate **My groups** tab in the *Search View*.

With succession planning charts, if enabled by your administrator, you can also:

Performing tasks using procedures New with This Version
Exporting Change Data
Generating a Change Report
Generating a Revision History
Modifying Successor Fields
Previewing a Book Style Chart or Previewing a Wall Style Chart
Printing Your Chart as a Book or Printing in Wall Chart Style
Searching Succession Candidates
Setting Chart Layout Options
Sending the Planning Chart to Another User
Setting Change Report Default Options
Work with Views
- 9 Box Matrix View
- List View
- Profile View
- Search View
- Creating a Side-by-Side Profile View
- Summary View
- Tree View

Storing Planning Charts

Adding a Succession Candidate to a Box

Available in OrgPublisher Premier, when you create a succession planning chart, the chart opens with no hierarchical information included because this type of chart is meant to help you plan for successors to specific positions within your company.

- You can add succession candidates by extracting them from a separate data source using the record type of **SC**. The **Box ID** records must match the box IDs of the positions for which they are candidates.
- You can also drag and drop individuals from their current box into the box of the position for which they are candidates. You must then change the position type manually.

Verify that you have satisfied the special considerations when building a succession chart from either a single data field or multiple data feeds.

Adding a Second Successor Position

Available in OrgPublisher Premier, a person may be a successor to more than one position.

Add a Successor with Drag and Drop

1. Place the mouse pointer on the person's name you want to become a successor. Hold down the left mouse button to select the name, which is outlined with a solid red line.
2. Continue to hold down the left mouse button and drag the name to the position needing a successor. The pointer includes a person icon while moving to the new box. When the cursor is on top of the current position holder's name (a dotted red line outlines the name), release the mouse button.

   The successor's name appears below the current position holder and a change icon appears in the top right of the chart box.

You can also copy and paste a successor into the new location within the succession planning chart. This method is helpful when placing someone in a box that is outside of the chart viewing area.

Add a Successor with Copy and Paste

1. Place the mouse pointer on the person you want to become a successor.

2. Right-click and select **Copy**.
3. Locate the box containing the current position holder by one of the following methods:
4. Searching for the person's name and clicking to navigate to the person
   – Drilling to the person
   – Scrolling
   – Using the context menu option
5. Place the pointer on the position holder's name and right-click.
6. Select **Paste**. The copied record is now a successor.

Creating a Successor in a Succession Planning Chart

Available in OrgPublisher Premier, you can work with succession planning charts. The easiest method for creating a successor in a succession planning chart is to use drag and drop.

1. Place the mouse pointer on the person's name you want to become a successor. Hold down the left mouse button to select the name, which is outlined with a solid red line.

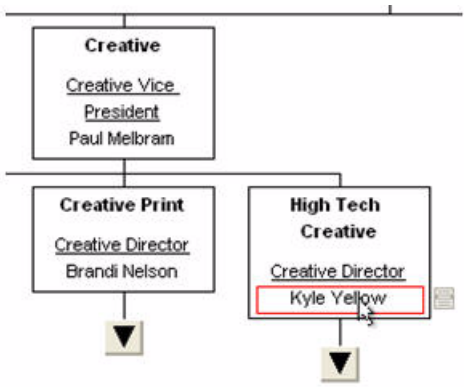


Figure 139

2. Continue to hold down the left mouse button and drag the name to the position needing a successor. The pointer includes a person icon while moving to the new box. When the cursor is on top of the current position holder's name (a dotted red line outlines the name), release the mouse button.

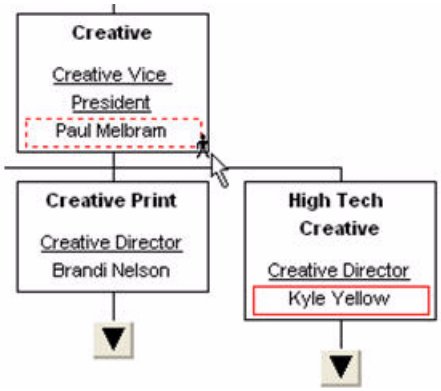


Figure 140

The successor's name appears below the current position holder and a change icon appears in the top right of the chart box.

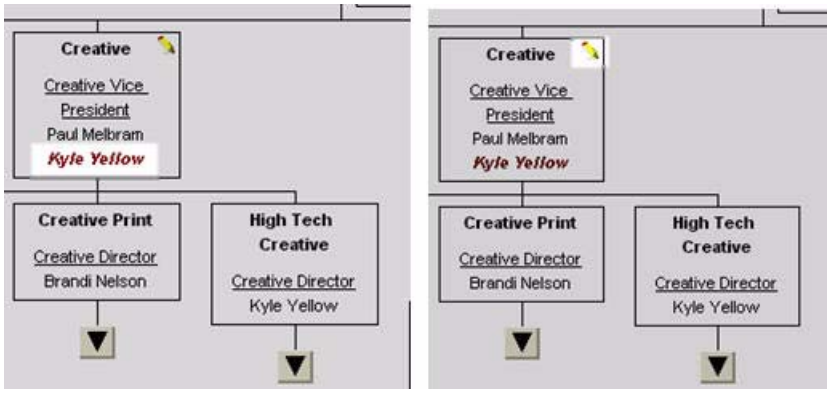


Figure 141

You can also copy and paste a successor into the new location within the succession planning chart. This method is helpful when placing someone in a box that is outside of the chart viewing area.

1. Place the mouse pointer on the person you want to become a successor.
2. Right-click and select **Copy**.

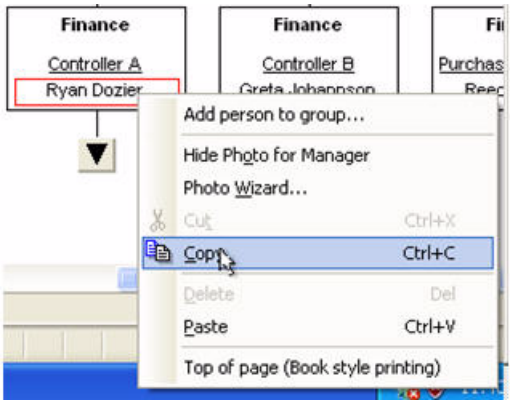


Figure 142

3. Locate the box containing the current position holder by one of the following methods:
   - Searching for the person's name and clicking to navigate to the person
   - Drilling to the person
   - Scrolling
4. Place the pointer on the position holder's name and right-click.
5. Select **Paste**.

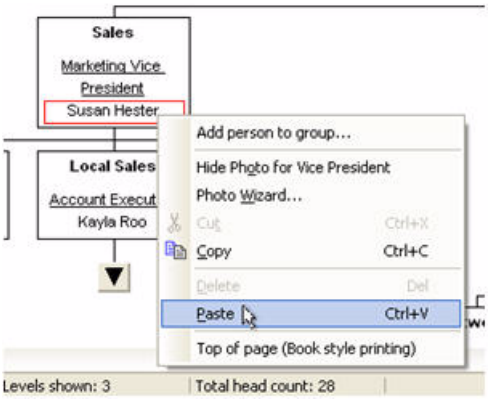


Figure 143

The copied record is now a successor.



Figure 144

Deleting a Successor

You may need to remove a person from a successor role (OrgPublisher Premier).

1. Right-click on the person's successor position in the chart.
2. Select **Delete** from the options list. This deletes only that successor occurrence of the person in the chart.

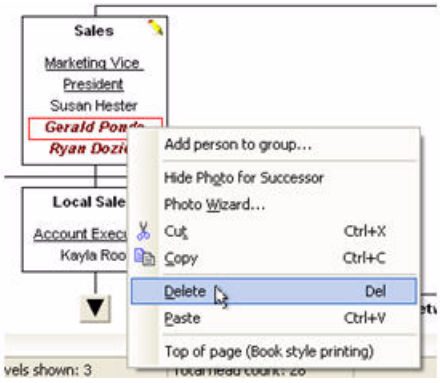


Figure 145

Note: *OrgPublisher does not leave an open position in the box when a successor is deleted.*

Drag and Drop from 9 Box Matrix in Planning Charts

You can drag a person's name from the 9 Box Matrix View available in OrgPublisher Premier, and drop it into the org model planning chart or succession planning chart.

1. Once the *9 Box Matrix* is created, click the name you want to add to the chart and hold down the mouse button.
2. Drag the cursor to the target box in the chart.
3. When the cursor is over the field where you want to drop it, release the mouse button.

   If you are working with org model planning, the name replaces the name in the target box. If you are working with succession planning, the name is added as a, or replaces the existing, successor.

Drag and Drop from Search View in Planning Charts

You can drag a person's name from the Search View and drop it into the org model planning chart or succession planning chart (OrgPublisher Premier).

1. After you conduct your search, click the name you want to add to the chart and hold down the mouse button.
2. Drag the cursor to the target box in the chart.
3. When the cursor is over the field where you want to drop it, release the mouse button.

   If you are working with org model planning, the name replaces the name in the target box. if you are working with succession planning, the name is added as a, or replaces the existing, successor.

Modifying Successor Fields

Planners (OrgPublisher Premier) can modify successor fields in the Succession Planning chart. You can cut, copy, and paste the successor names and associated ranking fields. You can also drag a name from the List View or Search View and place in a successor slot.

You cannot, however, modify any other position type or associated field.

If enabled by your administrator, the change icon displays in the succession chart box as changes are made.

Moving a Successor

In Succession Planning, available in OrgPublisher Premier, once a successor is in the chart, you can move them to a new location with drag and drop .

1. Place the mouse pointer on the successor's name.
2. Hold down the left mouse button and drag to the new location.

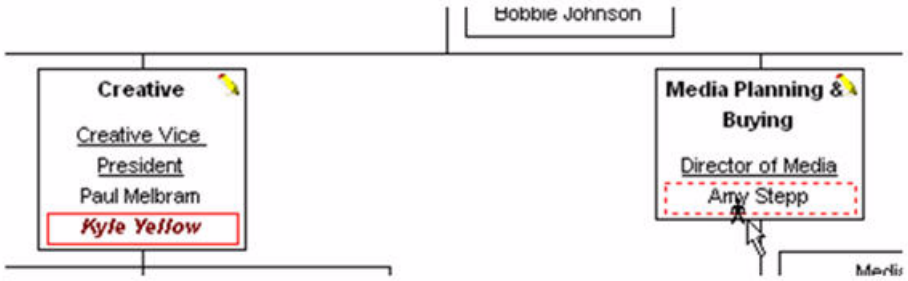


Figure 146

3. Release the mouse button. The successor displays in the new box.

Cut and Paste Successors

1. Place the mouse pointer on the successors name and right-click.
2. Select **Cut** from the options list.
3. Place the mouse pointer on the new location and right-click.
4. Select **Paste** from the options list. The successor displays in the new box.

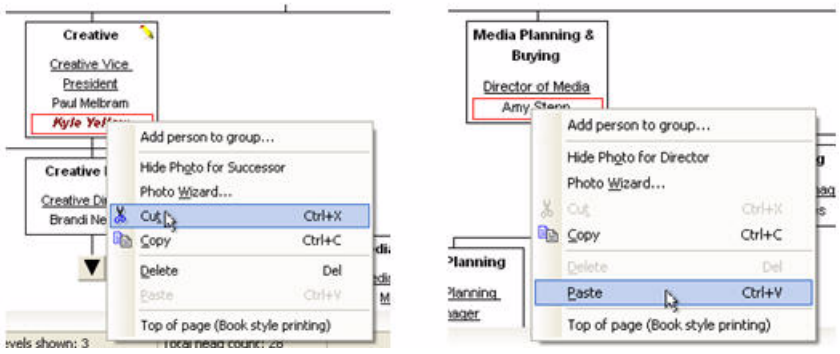


Figure 147

Rearranging Successors in a Box

After adding all of the successors (OrgPublisher Premier), you may want to rearrange them to indicate who is first (Successor 1), second (Successor 2), or third (Successor 3) in line for the position.

1. Place the mouse pointer over the name of the successor who should appear first in the list of successors.



Figure 148

2. Hold down the left mouse button and drag the successor on top of the current position holder's name.



Figure 149

3. Release the left mouse button.



Figure 150

4. Place the mouse pointer over the second successor in line for the position.
5. Hold the left mouse button down and drag the successor on top of the first in line successor's name.
6. Release the mouse and the second in line appears below the first in line successor.

Searching Succession Candidates

When working with a succession planning chart (OrgPublisher Premier), you can search for succession candidates using the *Search* dialog or Search View. When succession planning is enabled, the search feature includes searches for **Successor(s) in a box** and **Person succession count**.

For general searching information, see the Searching All Fields topic.

Searching for successors in a box

This search option provides a list of people in a box containing a selected number of successors, and helps you locate where you have no successors or too many successors for a specific position.

1. Open the *Search* dialog by selecting **Edit** from the menu bar, then **Search** from the pull-down options, or open the **Search View** pane in the List View. You can also click on the Search button  in the toolbar.

2. If you have selected a specific box in the Chart View, the *Search* dialog selects the **Search under** selected box check box. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under selected box** check box to clear it.

3. If you are using the Search View and want to start your search from a specific box in a chart, you must first select a box in the *Chart View* and then select the **Search under** check box. This begins the search at that point in the chart.

4. Select the **All Fields** tab.

5. In the **Search** field, click the drop-down arrow to select **Successor(s) in a box**. You can also press the key of the first letter of the field you want to navigate through the list.

6. In the **For** field, type the number of successors in a box you want to find. For instance, if you want to see all boxes that contain more than one successor, type 1.

7. In the **Match** field, click the down-arrow to select **=Equal to**.

8. Click **Search Now** or Go  . OrgPublisher performs the search and displays the matching records, successors and managers in the box in the lower pane.

9. You can save the search results as a group or perform an additional search.

Searching for person succession counts

The **Person succession count** uses the employee ID and position type of **<SC>** to determine if a person is slated for more than one position. Your organization may want to see everyone slated for more than one position.

You may also want to create groups showing people slated for 2 positions, 3 positions, etc.

Note: *The results show only the <SC> record, not an entry for the successor's standard position. In addition, this is a compound search. The Person succession count search option first goes through the data to find all <SC> records in the chart. The resulting <SC> records are searched a second time is to see if any employee IDs appear on the list more than once. Accurate employee IDs for each record must exist in your data in order to use this option.*

1. Open the *Search* dialog by selecting **Edit** from the menu bar, then **Search** from the pull-down options, or open the **Search View** pane in the *List View*. You can also click on the Search button  in the toolbar.
2. If you have selected a specific box in the Chart View, the *Search* dialog selects the **Search under** selected box check box. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under selected box** check box to clear it.
3. If you are using the Search View and want to start your search from a specific box in a chart, you must first select a box in the *Chart View* and then select the **Search under** check box. This begins the search at that point in the chart.
4. Select the **All Fields** tab.
5. In the **Search** field, click the drop-down arrow to select **Person successor count**. You can also press the key of the first letter of the field you want to navigate through the list.
6. In the **For** field, type the number you want to search on. For instance, if you want to see how many positions contain more than one successor, type the number 2.
7. In the **Match** field, click the down-arrow to select **>= Greater than or equal to**.
8. Click **Search Now** or Go  . OrgPublisher performs the search and displays the matching records in the lower pane.
9. You can save the search results as a group or perform an additional search.

   Side by side profiles are limited to 6 at a time if you auto-pin the profiles in the *Search View*.



Figure 151

Spotlighting Succession Groups

You can use the spotlighting a group feature with succession groups (OrgPublisher Premier) you have created. You can use this feature alone or you can use it in conjunction with spotlighting search results.

Note: *The Spotlighting feature works only in View Mode.*

1. To enable the spotlight group feature, select a succession group to display in the chart from the Groups View.
2. Right-click on the group label in the Style Bar to view the options list.
3. Click **Group filter in chart** then **Spotlight boxes in group**.

The first example uses a succession group created to show people who are designated to succeed more than one position.



Figure 152

The second example uses a succession group created to find managers with no successors.



Figure 153

Note: *When printing a chart with the spotlighting feature enabled, if your printer does not support AlphaBlend, your printed chart will show all boxes as in the past. See your IT administrator if you have any questions.*

Using Search View to Create a Successor

Another easy method for adding successors (OrgPublisher Premier) is to locate the successor in the **Search View** pane in the List View or by using Advanced search button 

in the toolbar to open the *Search* dialog. Once the person is located, you can drag the name to the box containing the current position holder.

1. Locate the box containing the current position holder.
2. Open the *List View* and activate the Search View.



Figure 154

3. Search to locate the successor.
4. Place the mouse pointer on the search result for the successor.
5. Hold down the left mouse button and drag to the box containing the current position holder.

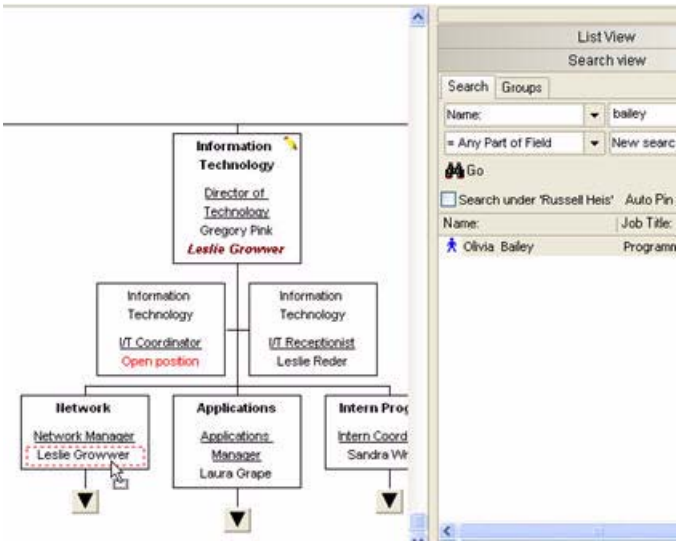


Figure 155

6. Release the mouse button.
7. The successor is added to the box and the person (Olivia Bailey) now appears twice in the Search View. The red text color indicates the successor position she holds in the chart.

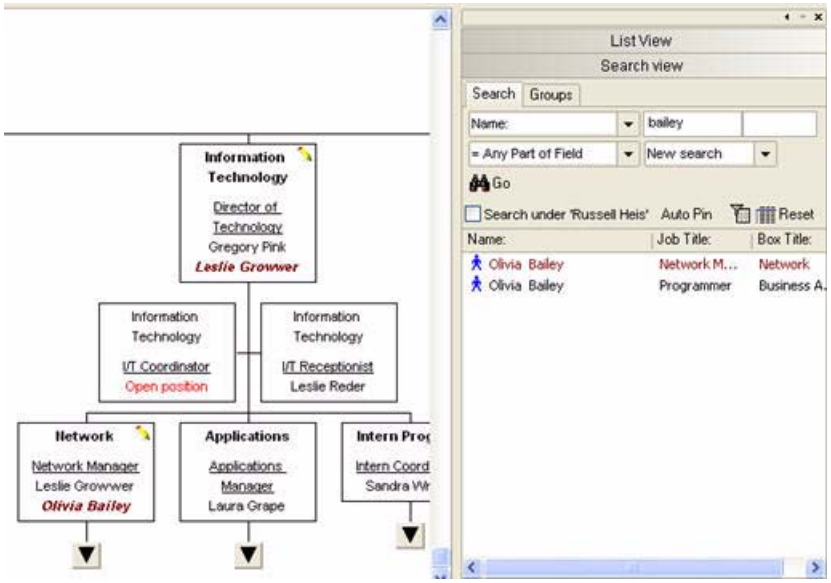


Figure 156

Using Succession Candidates in Groups

After you have created a group or groups with the results you require, you can use one of several options to indicate persons meeting the succession group criteria (OrgPublisher Premier). Some examples are:

Search Results for Succession Candidates

The first example uses a group created to show people who are **designated to succeed more than one position**.

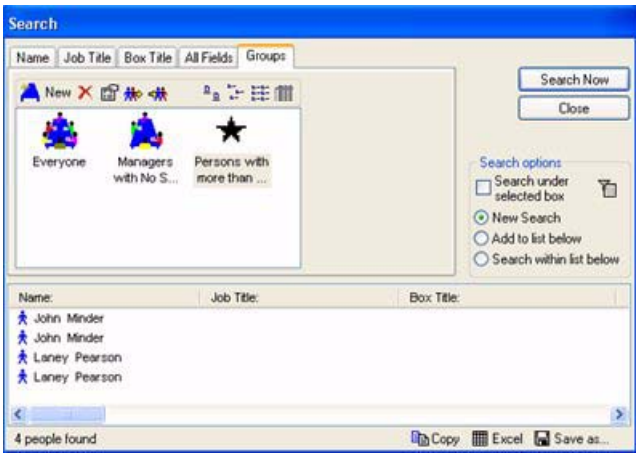


Figure 157

The second example uses a group created to find managers with no successors.

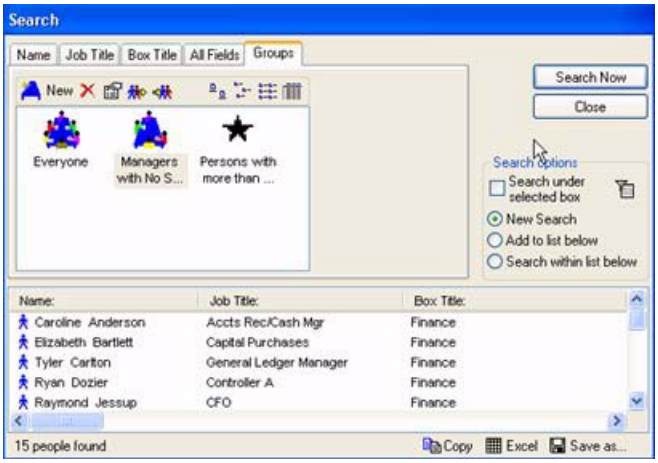


Figure 158

Using a Group Icon for Succession Groups



Figure 159

The above example uses a group created to show succession candidates who are designated to succeed more than one position.

Using a Multi-Report Icon for Succession Groups

Uses the employee ID to determine if a succession candidate is in the chart more than once. When the user clicks the icon, the Search View opens with a list of all occurrences of the person in the chart. If indirect reports are in the chart and the person is also a successor, the indirect role appears in the list.



Figure 160

CHAPTER 13

WEB ADMINISTRATION SERVER

Note: *Web Administration supports opening multiple data base charts (OCB, CSV) as long as those files exist in the SourceCharts folder. Web Administration, however, does not support creating multiple data source charts from these file types, neither does it support editing the text file charts using the Data sources dialog.*

Additional installation and storage information can be found in the How to Use Web Administration tutorial in the Support section on the Aquire Web site at www.aquire.com.

Web servers do not allow clients to schedule tasks. The OrgPublisher Web Administration Server allows you to publish charts manually. You can, however, open the desktop OrgPublisher version and schedule the publishing definition in the Publish charts dialog using the Web Administration SourceCharts folder.

1. Log on the server as an administrator or power user.

2. Open the desktop OrgPublisher application. (If default install is used, it would be in c:/program files/orgpubx).

3. Open the chart (found in the SourceCharts folder).

4. Schedule the publishing definition in OrgPublisher using the Schedules tab.

Also, when you are publishing to ECharts, you must manually schedule the BAT file created in the first manual publishing. To do this, open the Task Scheduler on the server to add the .BAT job.

Using Web Administration

OrgPublisher Web Administration runs as an ActiveX control that accesses files and data on a web server and works much like standard OrgPublisher. The OrgPublisher Web Administration host is installed to a web server and is accessed through a web page. Because all chart files exist on the web server, you can open any chart from any workstation.

This option is a custom installation and may involve additional work on the part of your web administrator. See the *OrgPublisher 9 Web Administration Installation Guide* in the Aquire Support Portal.

For each Web Administration installation, a single folder is created for **SourceCharts** and another one for **PublishedCharts**. In addition an html file, **OPAdmin.htm**, is created to host the web administration client. IIS provides security by allowing only chart administrators access to the source directory on the web server. The IIS account must have full access to the virtual directory containing the remote server DLL. This is necessary because the server DLL reads, writes, and deletes files.

You can also create an alternative destination directory to publish Web Administration charts to a more secured area.

This help file includes notations where features work differently in Web Administration. You can create new charts or open sample charts. Because all chart files must exist on the web server, administrators can open any chart from any workstation. OrgPublisher works much the same in Web Administration as it does in the desktop.

OrgPublisher with Web Administration can create, format, archive, print, and publish charts.

Accessing OrgPublisher Web Administration

OrgPublisher Web Administration is installed on a server. The installer creates a **PublishedCharts** and a **SourceCharts**. The network administrator creates authorization to these folders for anyone who needs access. Once this is done, a link is provided to anyone who has been granted access to the folders. The link points to the **opadmin.htm** for Web Administration access.

Importing a Chart

The first time you access OrgPublisher Web Administration, you may not have charts available or listed in the Select a Chart to Open dialog. You can create a new chart or import an existing chart.

1. To import a chart, click the **Import** button. The *Import OrgPublisher Chart* dialog opens.

Note: *ODB files must be recreated on the server to point to correct drivers and database or they may not import.*

2. Type the chart name and location in the **Import this chart** field, or **Browse** to the location of the chart you want to import.

3. Select the chart. OrgPublisher returns to the *Import OrgPublisher Chart* dialog. Click **Import**.

The chart name displays in the *Select a Chart to Open* dialog.

4. Select the imported chart and click **Open**.
   The chart opens in the Web Administration Server.

Opening an Existing Chart

1. Open OrgPublisher. The *Select a Chart to Open* dialpog appears.

Column name / Button	Descriptopn / Action
New	Opens the *New Chart Wizard*.
Delete	Deletes the selected chart.
Import	Imports a chart in the **SourceCharts** folder in Web Administration.
	Displays the charts as large icon.
	Displays the charts as small icons.
	Displays the charts as a list.
	Displays the charts as a detailed list.
Chart name	Displays the file name of the chart.
Type	Indicates the type of file associated with the chart name, such as **Chart file**.
Modified by	Displays the user name of the person who modified the chart.
Modification date	Displays the date and time the chart was last modified.
Lock Status	Indicates whether the chart is **Locked** or **Not locked**.
Locked by	Displays the user name of the person who locked the chart.
Locked on	Displays the date and time the chart was locked.
Open	Opens the selected chart in Web Administration.
Cancel	Cancels the action and closes the dialog.

2. Select the **Chart name** in the list and click **Open**.

3. If you want to work on or view another chart, click the **Open** button in the toolbar to access the *Select a Chart to Open* dialog.

4. Select the **Chart name** in the list and click **Open**.

   If you are opening a locked chart, the message dialog opens. *The Chart is Locked by Another User* dialog displays the user name of the

person who locked the chart and asks if you want to open the chart in read-only mode.

Click **Open Read-Only** or **Cancel**. You cannot modify a read-only chart.

Creating a New Chart

If you are viewing a chart in OrgPublisher Web Administration and want to create a new chart, select **File** from the menu, then **New** from the options list. You can also click the **New** button in the toolbar.

You can also click the **New** button in the toolbar in the *Select a Chart to Open* dialog.

Clicking the **New** button opens a new blank chart in OrgPublisher.

Publishing a Chart Using Web Administration

You can publish charts in the OrgPublisher Web Administration Server just as you do in the desktop OrgPublisher. You can download the OrgPublisher Software Development Kit (OPSDK)for additional information about using the Web Administration server.

1. Open OrgPublisher in your browser. The *Select a Chart to Open* dialog opens. The columns in this dialog are defined below.
   - **Chart name** - The name given to the chart in Web Administration.
   - **Modified by** - The login name of the person who last modified the chart in Web Administration.
   - **Modification date** - The date and time the chart was last modified in Web Administration.
   - **Lock Status** - Indicates whether the chart is Locked or Not locked in Web Administration.
   - **Locked by** - The login name of the person who has locked the chart in Web Administration.
   - **Locked on** - The date and time the chart was locked in Web Administration.
2. Select a chart to open from the list or select **New Chart**. Click **Open**. The selected chart opens in the browser.

   If you try to open a locked chart, a box displays the message **The Chart is Locked by Another User**, and gives you an option to **Open Read-Only** or **Cancel** your request.

3. Click the Publish button  in the toolbar. If this is the first time you are publishing a chart, the wizard opens to the first dialog which gives you a brief overview of the Publishing Wizard.

4. Accept the default **Express Mode** if you want to publish a basic chart. Select **Advanced Mode** if you want to make detailed option selections. Click **Next**.

5. Accept the default **Interactive Org Chart** selection if you want to publish to **PluginX** or **EChart**. Select the **Org Chart Document** radio button if you want to publish a **PDF**, **HTML**, or **Graphic**. Click **Next**.

6. Follow the publishing procedure for the publishing format you want:
   - Publishing in EChart Rich Client Format - make sure that you add "publishedcharts" to the URL Publish to location
   - Publishing in EChart Thin Client Format - make sure that you add "publishedcharts" to the URL Publish to location
   - Publishing in Graphic Format
   - Publishing in HTML Format
   - Publishing in PDF Format
   - Publishing in PluginX Format

7. If you publish an EChart to a server, the *EChart Link Summary* text box displays the published EChart link. Click on the link to open the published chart.

   Republishing Charts can also occur in Web Administration.

CHAPTER 14

SUPPLEMENTAL INFORMATION

About Conditional Formatting

With OrgPublisher you can format a group by creating a new position type and assigning the conditional position type to a group. When you assign conditional formatting to a group, the original format is removed and you must reassign custom fields. In addition, you can apply conditional colors to groups or fields within a group using the Adding a Background Color to a Box Area procedure.

Conditional formatting is not for all users or all formatting needs. This feature enables you to highlight a particular attribute or search criteria by graphical representation. Once the position type is created, you can format the box shape and color, text color and font type, and even the layout of the information within the box. Conditional formatting is not designed to display summaries or counts, nor will it replace the original position type assigned when you created the chart.

If you place the mouse pointer on a conditional position type box, the Status Bar displays the new/conditional position type. This is true in the application, PluginX and the EChart rich client. If you do the same in a secured EChart rich client the Status Bar displays the original position type to unauthorized end users and the new/conditional position type to authorized end users.

You can see the original position type in the *Update Person* dialog in the OrgPublisher application in *Build Mode*. You can also right-click on a name and select **Rename** to open the *Update Person* dialog.

You should use conditional formatting if you need to graphically represent people who meet specific criteria and you do not want to create or add additional custom position types within your data source, or if you want to graphically show a subset of an existing position type.

OrgPublisher uses position types to structure the org chart; position types are key to formatting and summary data.

Conditional Formatting Provisions

- If your EChart contains secured fields, it is recommended that you either do not publish your chart in thin client format or that you do not use conditional formatting on secured fields.
- In conditional formatting, the search feature and all calculations follow the conditional position type. Formatting follows the group. If you display the Summary View in a chart with conditional formatting, you should hide either the group or position type of the conditional format. If you don't, head counts display in both areas.
- If there is more than one group-based position type for which a person qualifies, the first match is used in Search and Summary tasks.
- If you create a group based on a standard position type, such as Manager, then associate a custom position type to the group for conditional formatting, such as Top Performing Manager, the original position type is no longer a part of the group criteria. For instance, if you then searched for all "managers" the "top performing managers" will not be part of your search results because they are now a different position type. Your Boolean search should use both the original position type, Manager, and the new position type, Top Performing Manager, as a criteria using **And/Or**.
- If you delete the custom position type, the records will return to the original position type assigned.
- It is recommended that you create separate charts based only on groups versus charts based only on position types.
- When using conditional formatting to create a position type group for Employees (record type **E**), the search results include both direct (E) and indirect employees (**IE**). If you need to separate the direct from indirect employees you can add additional logic to the *Group Editor* description of the group, such as:
  - **OR** PositionType = Employee
  - **AND** PositionType <> Indirect Report

About Interactive Charts

When you publish your charts, you can select either an interactive chart or you can publish an org chart document. An interactive chart enables end users to perform several tasks, such as conducting detailed searches and creating their own groups. An org chart document provides fewer end user features.

Published chart features, including multiple viewing levels, chart searches, ad hoc groups, Smart Links, or print preview, are not available when publishing to an org chart document. Org chart documents are, however, cross-platform publishing options.

Interactive Chart options:

- **PluginX** - When you choose this option, you can provide end users with the richest interactive experience, allowing them to navigate and search the chart, create their own groups, access hotspot links, and provide accessibility to the visually impaired.
- **EChart** - When you choose this option, you can publish an extremely large chart in either a rich client or thin client format, publish a real-time chart, and provide field level security and NT authentication.

About Org Chart Documents

When you publish your charts, you can select either an interactive chart, such as PluginX or ECharts, or you can publish an org chart document. An interactive chart enables end users to perform several tasks, such as conducting detailed searches and creating their own groups. An org chart document provides fewer end user features.

Published chart features, including multiple viewing levels, chart searches, ad hoc groups, Smart Links, or print preview, are not available when publishing to an org chart document. Org chart documents are, however, cross-platform publishing options.

Org Chart Document options:

- **PDF** - When you select this option, you can choose chart styles and the top of chart box, and print in Book style. In addition, this is the EChart thin client printing option. End users must have the Adobe® Acrobat® Reader® 9 software installed on their PCs.
- **HTML** - When you select this option, the published chart can contain basic interactive elements, such as drilling, hotspots, displayable views, and the email to a group feature.
- **Graphic** - When you select this option, the published chart is a static document, such as a JPG, that can be viewed on a browser.

Build and View Modes

OrgPublisher operates in either *Build Mode*  or *View Mode*  . You use *Build Mode* to create, edit, reorganize, and format charts. You use View Mode to format and view charts as they will be seen by your users when published.

You cannot hide chart components while in *Build Mode*, but you can switch to *View Mode* at any time. If you try to hide components while in *Build Mode*, OrgPublisher automatically switches to *View Mode*.

Note: *Build Mode features a Compact version so that you can view more of your chart while you work on it. Click the Compact Build Mode button and OrgPublisher hides everything in the chart boxes except the names. This way, you can drag and drop boxes in the Build Mode without all the custom fields, job, or box titles taking up screen space.*

Planning charts are always in Build Mode, and do not reflect special formatting, such as multi-level peer display, reports in the same box as their manager, or the Advanced Box Layout settings.

The *Compact Build Mode* is not available to save as a style, but you can create a similar chart style by hiding all your chart elements except the employee names.

Uses for each mode:

Uses	Compact Build Mode	Build Mode	View Mode
Create 9 Box Matrix	X	X	X
Create side-by-side profiles	X	X	X
Create workforce analysis graphs	X	X	X
Create charts		X	
Format charts	X	X	
Format chart components		X	X
Drill-up/Drill-down	X	X	X
View charts with components hidden	X		X
Launch browser to view a hotspot			X

Uses	Compact Build Mode	Build Mode	View Mode
Create organizational models	X	X	
Add and organize successors	X	X	

Chart Window

When you start OrgPublisher and open a chart, the OrgPublisher window opens. This window can have several sections depending on the views you select for the chart. It contains a main menu and several toolbars, which you can turn off if you choose. The Style Bar which displays the current chart style at the top, the Status Bar which displays the levels shown and the head count for those levels at the bottom of the window, are always visible.

The main window section, called the Chart View, contains the chart components, such as data and photos, arranged in boxes. The sample below includes telephone numbers, departments and head counts. The *Chart View* is always displayed, regardless of how many other views you select.

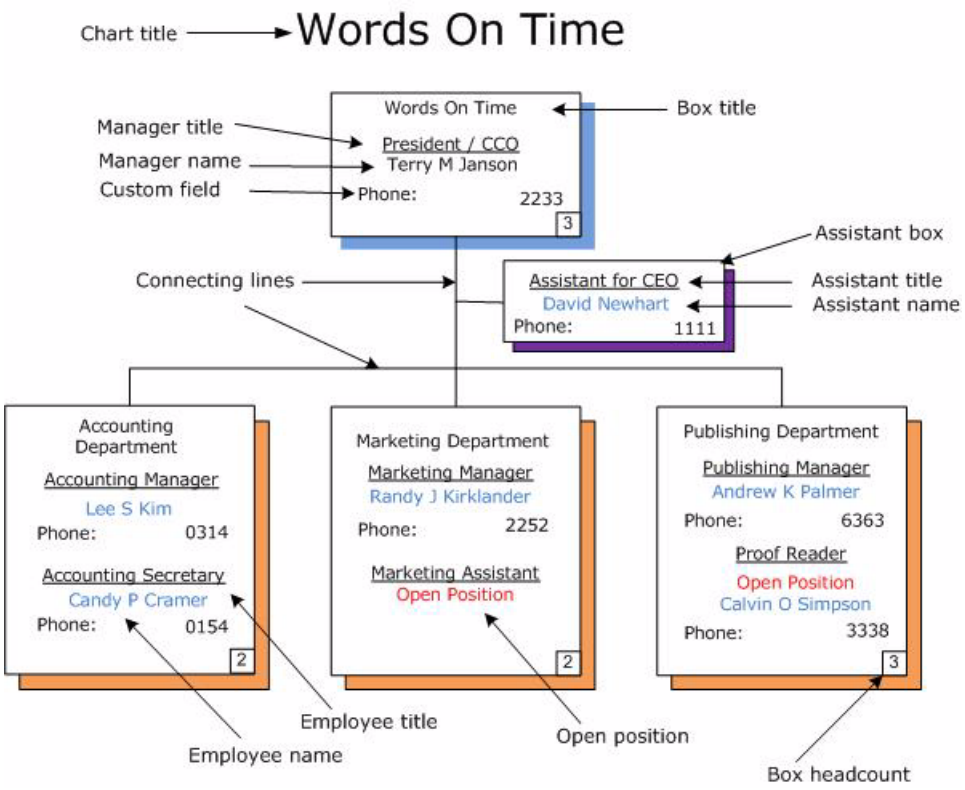


Figure 161

You can move views, except for the *Chart View*, to display anywhere in your chart.

OrgPublisher views include:

- 9 Box Matrix View
- Chart View
- Groups View
- List View
- Profile View
- Search View
- Style View
- Summary View
- Tree View
- Wizard View

End User Accessibility

The OrgPublisher PluginX chart can be accessed by JAWS® for Windows screen reading software for the blind and visually impaired.

When you publish a PluginX chart, you can enable the Section 508 accessibility option in the Publishing Wizard.

An accessible chart works best if published with only the Chart View available using chart layout 1. We recommend that you not publish peripheral views, such as Profile View or List View, and that you disable the Views Toolbar when using the *Publishing Wizard*. In addition, you should consider using larger fonts and basic colors.

The following functions are supported in the PluginX chart via the keyboard.

Functions	Keyboard COmmand	Description
Find	**F** key	Opens the *Enter Search text* dialog. This is equivalent to an All fields search, for example, type a first or last name, or a job or box title. Press the space bar or Enter to begin the find, or press **TAB** to the **Cancel** button.
Find Next	**N** key	Performs a "find next" matching record function if a previous search occurred. Searches all fields one field at a time.
Zoom in	**CTRL+**	Raises the zoom factor by one level.
Zoom out	**CTRL-**	Lowers the zoom factor by one level.

Toolbar support is not currently available.

Note: *JAWS hot keys, such as F for the next form field and L for the next list, are disabled. OrgPublisher PluginX accessible charts do not contain form fields, lists, links, or tables. If you use a high zoom-in level, you may notice JAWS takes a little longer to read the screen.*

End users can navigate through the chart using the **UP**, **DOWN**, **LEFT**, and **RIGHT** arrow keys. The Drill-up/Drill-down to another level function occurs automatically.

- When a chart is opened the top box is automatically selected.
- A box must always be selected. Drilling on "white space" will not clear the current box.

- Only one box is selectable at a time. Hierarchical "trees" are not available.
- To access a sibling of a selected top box with a drill-up button, click the up arrow first, then the left or right arrow. If the requested sibling does not exist, the original box will remain selected.
- If JAWS is running and you tab away to another application, the focus on the chart may be lost. To regain focus, press **ALT TAB** to go to another application and then press **ALT TAB** again to refocus on the chart.

Note: *You can also enable the accessibility mode manually by modifying the HTM file or the registry. To enable accessibility mode via the registry, set the string registry entry* ***HKEY_CURRENT_USER/SOFTWARE/Aquire/OrgPublisher/Settings/Accessibility*** *to "1." To enable accessibility via the HTM file, set the ActiveX parameter named AccessiblityMode to "1" in the hosting HTML.*

Input File Layout Rules

When mapping your data to OrgPublisher, keep in mind the following points.

Note: *A conditional formatting position type is used for formatting purposes only and does not override a position type pulled from your data source.*

Fields

1. Each input record must be laid out according to the Input File Layout.
2. The first two fields in each record must contain the correct reporting relationship information before a chart structure can build successfully.
3. The first 10 fields in each input file must be mapped correctly, matching the OrgPublisher Input File Layout, although only the first two fields are required to contain data.
4. Field **5** must contain a **unique person or employee ID** if you intend to display multi-relationship icons in your chart. ***This ID should not contain sensitive information because it is displayed in the Update Person dialog and is searchable by end users.***
5. Fields **11**, **16**, **17**, and **19** are reserved fields for use by OrgPublisher. Populating field **17** with a unique position ID is strongly recommended when using OrgHistory.

6. Fields **12**, **13**, and **14** can contain sequence numbers (integers only) used by OrgPublisher. Field **12** is used to **Sort by box ID** in the **Sort Options** feature.

7. Field **4** contains the record type. The record type defaults to **E** (employee) when blank.

8. Use Field **18** for level numbers if you want to use the Multi-level Peer Display feature. *The Multi-level Peer Display feature is not applicable to Assistant boxes and boxes reporting to Assistants.*

9. Custom fields begin with Field **20** and can continue sequentially through the rest of the fields.

10. If you plan to use the Comparing Two Charts feature, it is strongly recommended that you create a custom field called **Position ID** and assign a unique ID to each instance of a person in the chart. In addition, each open position should be assigned a unique ID.

11. Summary fields begin with Field **26** and can continue sequentially through the rest of the fields.

12. It is necessary to enclose fields in quotes only when there is a comma within the field, for example, "**Smith,jr**". The following record is valid, **0001,0002,Box title,B,,,,,,,**.

13. Make sure that the Input File Layout does not contain the quote character within any field. The following record is invalid, **0001,0002,"Sales" Dept.", B,,,,,,,**.

14. There should be no blank spaces or special characters (such as **#**, **-**, **|**, **+**, **=**, **<**, **>**, **@**, **$**, etc.) in field names.

15. You can create open positions in your chart by passing null records into the **Last Name**, **First Name**, and **Middle Name** input fields (Fields **6**, **7**, and **8**).

16. When building a succession planning chart, you must select the **Specify custom field order** option to map your data. This allows you to map your data to standard Succession Candidate fields (Fields **50** - **64**).

Record types

1. The Record Type defaults to **E** (employee) when blank.

2. Record types **B** and **BA** do not display names or job titles in the chart boxes.

3. Chart boxes are built in ascending sequence by **Box ID**.
4. Job titles display in ascending sequence by **Job ID** within each box.
5. Each record in an OrgPublisher file represents a position in the chart.
6. Custom position record types should be defined in your text input file. Custom position record types may be defined in the chart by selecting **Edit** from the menu bar, then **Define** from the pull-down menu. The record type should include before and after brackets, for example **<T>**.
7. The input records may be in any order.
8. If Box IDs are the same for two records and they report to the same manager, they will be placed in the same box.
9. Assistant boxes (record type **BA**) cannot have a reporting Assistant box.
10. Assistant boxes (record type **BA**) cannot have a reporting Partner box (record type **P**).
11. Boxes reporting to Assistant boxes (record type **BA**) cannot have reporting boxes.
12. Charts containing Succession Candidate (record type **SC**) contain no hierarchical information.

Data files

1. Always use the same text file name each time you export data from your database. The text file name should match the template file (**OTM**) name and should also be located in the same directory as the template file. OrgPublisher automatically creates the **OTM** file when you save your chart.
2. An input text file that does not have a corresponding template file (**OTM**) will be assigned a default template automatically by OrgPublisher.
3. Avoid naming your text data with the extension **OCP**. This is reserved for use by OrgPublisher when publishing a file.
4. There should be no blank records at the end of the file.
5. When the **AutoTitle** feature is enabled, the top box title displayed in the chart is used as the chart title.

Inserting Chart Components

Buttons for chart components are contained on the Insert toolbar and listed in the **Insert** menu. You can insert these components manually or with the New Chart Wizard.

To insert chart components, you can do one of the following:

- Select the component from the **Insert** menu.
- Select the component using the shortcut keys. (To identify the shortcut keys, select the menu option and use the keys displayed next to the component name.)
- Select a button from the toolbar. (To identify a button, float the cursor over it. A description appears.)

You must be in *Build Mode* to create new charts and insert chart components.

The first component you insert is a box. Boxes are containers for other chart components such as jobs, people, hotspots, custom fields, and open positions. Boxes must be inserted in the chart before other components can be added. There are three types of boxes:

Normal 

Assistant 

Partner 

The box type you will probably use most frequently is the box that inserts a person, job and box at the same time  . Like the normal box type, this box is inserted beneath the box on which you drop it. The Insert Person/Job box inserts a normal box with prompts for box title, job title, and employee name by position type.

Unique formatting is assigned to the assistant box and partner box. Assistant boxes are inserted beneath and to the right of the higher-level box. Multiple assistant boxes alternate to the right and left of this box. A partner box is inserted on the same level and to the right of the box on which it is dropped. In addition, you can use a Staff Function box which works similarly to an Assistant box but allows a full hierarchy beneath it. In order to use this special box type, you must first create a Staff Function position type.

It's important to note that position type is not an actual chart component, although it controls some of the properties and formats of chart components. The first time you open OrgPublisher, an employee position type is automatically assigned to the first inserted box. After that, the default is the last position type assigned. Review the Selecting a Position Type for Insert procedure for detailed information.

Additional information can be found in the following topics:

- Inserting Assistant Boxes
- Inserting Normal Boxes
- Inserting Open Positions
- Inserting Partner Boxes
- Inserting People
- Inserting a Person/Job Box
- Inserting a Chart Title
- Inserting a Custom Field for a Single Position Type
- Inserting a Custom Field for all Position Types
- Inserting Hotspots
- Inserting Logos
- Inserting Photos

Note: *Although this section provides information on manually editing a chart, remember that if you want the changes to remain permanent, you must apply the changes to your HR database. When your HR data is refreshed and you open your chart, your manual changes are overwritten.*

Menus and Toolbars

OrgPublisher uses a main menu and several toolbars containing buttons that perform charting functions. You can drag toolbars anywhere on the OrgPublisher window.

Using toolbar options and buttons, you can open wizards, insert chart components, navigate through your chart, and search the chart for a specific employee, position or custom field, to name just some of the tasks.

The OrgPublisher menus and toolbars are:

- Format Toolbar
- Insert Toolbar
- Main Toolbar
- Menu Bar
- Navigation Toolbar

Scroll Bars
Status Bar
Style Bar
Text Toolbar
Title Bar
Views Toolbar

Format Toolbar

The Format toolbar contains the buttons you use to format the chart, such as colors and text, show or hide chart components, or use multi-level fields.

Button	Description
	**Chart Design Template** Select a style from "thumbnail" options in the *Chart Design Templates* dialog. Applying a formatting template overwrites any *Advanced Box Layout* settings you may already have in your chart.
	**Change color** Change the color of the selected item. Custom colors are available for some chart components, such as boxes and chart backgrounds.
	**Format boxes** Format the appearance of boxes by position type, across all styles or for all position types.
	**Format text** Format the appearance of text for each text component by position type, across all styles or for all position types.
	**Legend Properties** Select the properties for a chart icon legend from the *Chart Legend Properties* dialog.
	**Show / hide chart components** Show or hide chart components including position type, box / job titles, and names.
	**Custom fields** Add or modify custom fields.

Button	Description
	**Move down a level** Move the selected box and report-to boxes down a level. Must be in *View Mode* with the **Show multi-level peers** option selected in the View menu.
	**Move up a level** Move the selected box and report-to boxes up a level (if not the top of chart). Must be in *View Mode* with the **Show multi-level peers** option selected in the **View** menu.

Insert Toolbar

The Insert toolbar contains the buttons you use to add components , such as jobs, people, fields or photos, to the chart.

Note: *When creating a Staff Function box type you must use the Position Type Wizard.*

Button	Description
	**Insert Box containing a person and job** Inserts a box containing person and job fields into the chart.
	**Insert box** Inserts a normal box into the chart.
	**Insert Job** Inserts a job field into a box in the chart.
	**Insert Person** Inserts a person field into a box in the chart.
	**Insert Open Position** Inserts an open position field into a box in the chart.
	**Insert Assistant Box** Inserts an assistant box into the chart.
	**Insert Partner Box** Inserts a partner box into the chart.
	**Insert Custom Field** Inserts a custom field or position type field into a box in the chart.

Button	Description
	**Insert Hotspot** Inserts a hotspot control into a box in the chart. Option not available in planning charts.
	**Insert Photo** Inserts a photo into a box in the chart. Option not available in planning charts.

Main Toolbar

The Main toolbar contains the buttons associated with standard window tasks, as well as OrgPublisher options. You can create, save, print, and format your org charts using buttons.

Button	Description
	**New** Opens a new chart using the default OrgPublisher settings.
	**Open** Opens an existing chart.
	**Save** Saves the chart. If this is a new chart, the *Save As* dialog displays so that you can assign a name to the file.
	**Publish** Produces a chart in formats suitable for intranet or Internet publishing. Charts in these formats can be viewed with Web browsers.
	**Manage chart archives** Opens *OrgHistory Archives* dialog to update or create a new archive chart.
	**Cut** Sends the selected text or object to the clipboard and deletes the text or object from the screen.
	**Copy** Sends a copy of the selected text or object to the clipboard and leaves the text or object on the screen.
	**Paste** Copies the contents of the clipboard to the screen.

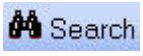
Button	Description
	**Undo** Reverses, the latest action. May be repeated to undo additional actions. You can undo content-related changes, such as adding, deleting, moving, and copying information.
	**Print** Prints the chart. Prints a specific chart view if it is selected in **Print Option**s or the Print Wizard.
	**Print preview** Displays the chart as it will look when you print it and is only available in the Chart View.
	**Print setup** Opens the system *Print Setup* dialog.
	**Send to PowerPoint** Displays the chart as it will look in Microsoft® PowerPoint and is only available in the *Chart View*.
	**Compact Build Mode** The editing mode in which everything except the employee name is hidden; provides an easy-to-view, compact chart to facilitate dragging and dropping boxes. Click the *Compact Build Mode* button and OrgPublisher hides everything in the chart boxes except the names. This way, you can drag and drop boxes in the *Build Mode* without all the custom fields, job, or box titles taking up screen space.
	**Build Mode** The mode in which you edit your chart. Content and formatting changes are made while in the *Build Mode*. *Build Mode* also features a Compact version, noted above, so that you can view more of your chart while you work on it. Planning charts are always in *Build Mode*, and do not reflect special formatting, such as multi-level peer display, reports in the same box as their manager, or the *Advanced Box Layout* settings.

Button	Description
	**View Mode** Displays your org chart as it will look when published. You can change formatting in the *View Mode*, but not content. Chart components can be hidden so that they do not show in *View Mode*.
	**Context help button** Starts the context-sensitive portion of the help system. Click the Help button, and then click a toolbar button or inside a wizard for additional information.

Navigation Toolbar

The Navigation toolbar contains the buttons that help you move through the chart and find information. You can change the number of levels viewed, go to the top of the chart, drill-up or drill-down, set the top of chart, zoom, or display the whole chart using the toolbar buttons.

Note: *The Find Next button and Search from toolbar field can be used together to enter text of any field (or select from existing fields in a drop-down list) and search the chart. Searches all fields one field at a time. You can type two words, such as first name and last name , and press Enter to begin the search.*

Button	Description
	**Go to top of displayed chart** Click this button to move the Chart View to the top center of the displayed drilling level.
	**Groups** Click this button to display the *Search* dialog at the **Groups** tab.
	**Look For** Use this field to enter your search text. Searches are based on text you enter in the toolbar field or select from the drop-down list, if previous toolbar searches have been performed. You can type one or two words, such as first name and last name. Searches all fields one field at a time.
	**Search** Click this button to display the *Search* dialog at the **Name** tab.

Button	Description
	**Go** Clicking this button starts the chart search on a box - to-box basis for the next instance of a matching record. Searches based on text you enter in the adjacent toolbar field or select from the drop-down list. You can type two words, such as first name and last name, and then press **ENTER** to begin the search.
	**Set Top of Chart** Clicking this button designates the selected box as the top of your chart for the selected style.
	**Display Whole Chart** Click this button to display the chart from the highest box in the hierarchy.
	**Drill-up and Drill-down** Click this button to enable the drill buttons in your chart which facilitate navigation between shown and hidden levels.
	**Levels** Click this button to select the number of levels from the drop-down list that you want to display.
	**Zoom to point** Click this button to make a selected box the center of the chart display.
	**Zoom** Click this button to set the zoom percent for the chart display.

Status Bar

The Status bar contains important information about the chart, such as levels shown and head count. This information varies, depending about where in the chart you have placed the cursor.

Data Displayed	Description
Position Type	This section displays position type of a selected chart component or the description of a selected toolbar button.
Number of levels shown	This section displays the number of levels shown in the currently displayed section of the chart.

Data Displayed	Description
Head count	This section displays the total head count for the currently displayed chart (*Build Mode* only), or the specific job head count for a selected job title within a box, or the shown head count for the currently displayed chart (*View Mode* only). **Note**: *Orphan records and broken hierarchies can adversely affect summary and security functions. Unexpected results can occur that may cause head count or other totals to be incorrect.*
Planned head count	This section displays the planned head count for the chart, which includes the total head count and open positions.

Style Bar

The Style bar displays the style name of the open chart on the left-hand side of the bar.

Data Displayed	Description
Style name	This section displays the name of the style currently open in your chart. Click the drop-down arrow (if available) to open the Style View and select another style.
Group name	This section displays the name of the group currently shown in the chart. Click on the drop-down arrow (if available) to open the Groups View and select another group.

With the Style Bar you can:

- Showing or Hiding the Style Bar
- Editing the Style Bar Label
- Pinning the Style View
- Opening a Selected Group in the Chart View

Text Toolbar

The Text toolbar contains the buttons you use to format (bold, italic, underline) and align text (left justify, center, right justify) in the chart boxes.

Button	Description
	**Bold** Click this button to make the selected text or numbers bold. Clicking again removes the bold formatting.
	**Italic** Click this button to make the selected text or numbers italic. Clicking again removes the italic formatting.
	**Underline** Click this button to underline the selected text or numbers. Click again to remove the underline.
	**Left justify** Click this button to align the selected text or numbers to the left of the box or text area.
	**Center** Click this button to align the selected text or numbers to the center of the box or text area.
	**Right justify** Click this button to align the selected text or numbers to the right of the box or text area.

Title Bar

The title bar displays the OrgPublisher product name and the name of the open chart. If you have not saved your chart, the title bar displays the OrgPublisher product name followed by a number.

The title bar contains the Control button in the upper left corner as a chart icon, and the standard **Minimize**, **Maximize**, and **Close** buttons in the upper right corner. The Control button can also close OrgPublisher.

Views Toolbar

The Views toolbar contains the buttons you use to select the chart view you want to display. Click on a button in the toolbar to display the view name, such as List View and Profile View, and description.

Note: *The Tree View is not available when publishing as an EChart thin client or PDF.*

Button	Description
	Click this button to open and close the Wizard View, which displays the available OrgPublisher wizards.
	Click this button to open and close the Style View, which displays the styles available for the open chart.
	Click this button to open and close the Tree View, which displays the chart in an outline format. Click on a position or name to locate it in the chart.
	Click this button to open and close the List View, which lists employees in the chart. The view contains two panes. One pane lists only the employees in the portion of the org chart that is shown. The **List View** pane shows custom information such as telephone numbers and office locations and is used as the index for a chart printed in Book style format. You can click on a name in this list to locate it in the chart. Columns can be sorted. The **Search View** pane enables you to conduct a search for specific information, and to create and save a new group. Click on a name in this list to locate it in the chart. The Search View can, typically, also list everyone in the chart. Columns can be sorted.
	Click this button to open and close the Profile View, which displays information about an employee or position, including custom fields that are defined for that position type.
	Click this button to open and close the Summary View, which displays summary fields and totals by position type and group.
	Click this button to open and close the 9 Box Matrix View, which displays a matrix of employees representing performance and potential specified in the *9 Box Matrix Wizard*.

Note: *The Summary View is not available in published real-time charts.*

Scroll Bars

If a chart is too large to display completely in the active OrgPublisher window, scroll bars display along the right and bottom sides of the window. You can use the scroll bars to show other parts of the chart or view.

Menu Bar

The menu bar contains the headings for OrgPublisher's pull-down menus. You can create, edit, save, print, and format your org charts using menu options.

File menu

Menu Option	Description
New	Opens the New Chart Wizard; if a chart is currently open, asks if you want to save any changes made.
Open	Opens the *Open* dialog and allows you to select or Browse to a chart file and open it in OrgPublisher.
Open for formatting only	Opens the *Open* dialog and allows you to select or **Browse** to a chart file and open it in OrgPublisher and make only formatting changes.
Save	Use this button if you are working in the OrgPublisher application to save changes to the chart.
Save As	Use this button if you do not want to amend the current chart file, but do want to save changes in the chart under a different file name.
Publish	Opens either the Publishing Wizard (if you have not yet published a chart) or *Publish charts* dialog (if you have already published a chart) in order to create, update, or delete a publishing definition.
Styles	Opens the *Styles* dialog in order to create or delete styles in the current chart.
Set template as default	Makes the current style temple the default for all charts unless otherwise specified.
Print	Opens the Print Wizard, if enabled, in order to print the chart; if the *Print Wizard* is disabled, opens the system print dialog for your machine.
Print preview	Opens the *Print Preview Type* dialog to select either the Wall chart or Book style.
Print setup	Opens the system *Print Setup* dialog for your machine to set paper size and orientation.
Print options	Allows you to select or clear the **Use Print Wizard** option, as well as select a view (if open in the chart) or open the *Print Header/Footer Options* dialog.
Exit	Closes OrgPublisher after asking if you want to save the modifications in the chart.

Edit menu

Menu Option	Description
Undo	In *Build Mode*, reverses the most recent change made to the content of the chart.
Cut	In *Build Mode*, cuts the selected box or data and places it in the "clipboard."

Menu Option	Description
Copy	Copies the selected box or data and places it in the "clipboard."
Paste	Pastes the box or data from the clipboard to the selected location in the chart or another application.
Rename	In *Build Mode*, allows you to rename the selected data component in the chart.
Search	Opens the *Search* dialog at the **Name** tab.
Groups	Opens the **Groups** tab of the *Search* dialog.
Delete	In *Build Mode*, permanently removes the selected box or data from the chart.
Define	Opens the *Define* dialog for position types and hotspot links.
Move up a level	When in *View Mode*, moves the selected box up a level within the hierarchical chain.
Move down a level	When in *View Mode*, moves the selected box down a level within the hierarchical chain.

View menu

Menu Option	Description
Build mode	In this mode, you can edit the chart data or formatting.
Compact build mode	Displays only the employee names in the chart boxes, allowing you more room to work in the Chart View.
View mode	In this mode, you can see what the chart will look like when it is published; you can also due basic formatting, such as using the multi-level peer display.
Zoom	Provides list of zoom options for selection.
Go to top of displayed chart	Moves the *Chart View* to the top center of the displayed drilling level.
Set top of chart	Designates the selected box as the top of your chart for the selected style.
Display whole chart	Displays the chart from the highest box in the hierarchy.
Drill up/Driill down	Turns the drill feature on or off in the chart.
Show/Hide chart components	Opens the *Show/Hide Chart Components* dialog at the **Components** tab.
Show custom Levels	Opens the *Show/Hide Chart Components* dialog at the **Levels** tab.
Show all levels	Reduces the all levels view and returns to the original number of levels selected to display; only enabled if **All levels** has been selected from the Levels drop-down options.

Menu Option	Description
Show multi-level peers	In the *View Mode*, enables the use of the **Move up a level** and **Move down a level** buttons.
List View	Opens or closes the List View in the chart.
Style View	Opens or closes the Style View in the chart.
Profile View	Opens or closes the Profile View in the chart.
Summary View	Opens or closes the Summary View in the chart.
Tree View	Opens or closes the Tree View in the chart.
Wizard View	Opens or closes the Wizard View in the chart.
9 Box Matrix	Opens or closes the 9 Box Matrix View in the chart. (OrgPublisher Premier)
Reset Docking Windows Layout	Returns maximized views to their original docked state.
Toolbars	Allows you to select the toolbars to view in the OrgPublisher window, as well as styles and groups toolbar options.
Status bar	When selected, the Status bar displays the name of the selected position type in the chart, as well as the levels shown and head count.

Insert menu

Menu Option	Description
Select position type	When in *Build Mode*, opens the *Select Position Type for Insert* dialog.
Person in box	When in *Build Mode*, the cursor changes and, when clicked inside a box, inserts a new box with a person label below the clicked box.
Person	When in *Build Mode*, the cursor changes and, when clicked inside a box, inserts a person label.
Job	When in *Build Mode*, the cursor changes and, when clicked inside a box, inserts a job label.
Box	When in *Build Mode*, the cursor changes and, when clicked inside a box, inserts a new box below the clicked box.
Open position	When in *Build Mode*, the cursor changes and, when clicked inside a box, inserts an **Open position** label.
Assistant box	When in *Build Mode*, the cursor changes and, when clicked inside a box, inserts an assistant box type below and to the right (or left, if another assistant box already exists) of the clicked box.
Partner box	When in *Build Mode*, the cursor changes and, when clicked inside a box, inserts a partner box type to the right of the clicked box.

Menu Option	Description
Custom field	When in *Build Mode*, the cursor changes and, when clicked inside a box, insert a label for a new custom field.
Hotspot	When in *Build Mode*, the cursor changes and, when clicked inside a box, opens the Hotspot Wizard.
Photo	When in *Build Mode*, the cursor changes and, when clicked inside a box, opens the Photo Wizard.
Logo	Opens the Logo Wizard.
Legend	Opens the *Chart Legend Properties* dialog.

Format menu

Menu Option	Description
Font	Opens the system *Font* dialog; modifications made in this dialog change the font across the current style.
Chart design templates	Opens the *Chart Design Templates* dialog.
Text	Opens the *Format* dialog at the **Text** tab; modifications made in this dialog change the text by position type and data component in the current style.
Boxes	Opens the *Format* dialog at the **Boxes** tab; modifications made in this dialog change the box style by position type in the current style.
Lines	Opens the *Format* dialog at the **Lines** tab; modifications made in this dialog change the connecting lines by position type in the current style.
Chart	Opens the *Format* dialog at the **Chart** tab; modifications made in this dialog change the current style.
Title	Opens the *Format* dialog at the **Title** tab; modifications made in this dialog change the title in the current style.
Advanced Box Layout	Opens the *Format* dialog at the **Advanced box layout** tab; modifications made in this dialog change the current style.
Colors	Opens the system color grid; changes made in this dialog change the background color of the current style.

Tools menu

Menu Option	Description
Style Wizard	Opens the Style Wizard to create a new style or modify the current style.
Publishing Wizard	Opens the Publishing Wizard to create a new publishing definition and choose the publishing components and formats; if a publishing definition already exists, open the *Publish charts* dialog to perform the same tasks or schedule a publish time.
Position type Wizard	Opens the Position Type Wizard to create a new position (chart wide), assign it to a group, if applicable, and select the box type in which to display it in the current style.
Head count Wizard	Opens the Head Count Wizard to select the population for the head count and in what position to display it in the current style.
Custom field Wizard	Opens the Custom Field Wizard to create and name a new custom field (chart wide), and select the position type and data component to display the field in the current style.
Hotspot Wizard	Opens the Hotspot Wizard to create a hotspot link, select a base path, and choose position type to display the hotspot.
Summary Wizard	Opens the Summary Wizard to select existing numeric fields for which to create totals in the current style.
Logo Wizard	Opens the Logo Wizard to add, modify, or delete a logo in the current style.
9 Box Matrix Wizard	Opens the 9 Box Matrix Wizard to convert tracked performance data into a new or modified matrix grid.
Manage OrgHistory Archives	Opens the OrgHistory Archive Wizard in order to ; if an archive already exists, opens the *OrgHistory Archives* dialog to perform the same tasks or compare charts.
Compare two charts	Opens the *Compare Charts* dialog to select the charts for which you want to view a change report; you can also customize the change report.

Data menu

Menu Option	Description
Custom field properties	Opens the *Custom Field Properties* dialog to create, delete, modify or secure custom fields.
Manage data sources	Opens the *Data Sources* dialog in order to modify or delete an existing data source (s), or to create a new source using the New Chart Wizard.
Refresh	If your chart was built using a data connection, changes made to data in your HR database are applied to the chart data.

Options menu

Menu Option	Description
Use Hotspot Wizard	Enables or disables the use of the Hotspot Wizard in OrgPublisher.
Messages	Enables error messages while working in OrgPublisher, for instance errors in hierarchical data.
Synchronize navigation between styles	Retains the same location in the chart when changing styles.
Photo wait	Displays available wait time to display photos in OrgPublisher.
Sort options	Opens the *Sorting Options* dialog to select the box sort order.
Color scheme options	Opens the *Select Color Scheme* dialog to choose a color scheme for the OrgPublisher window.
Text encoding options	Opens the *Text Input Encoding Options* dialog to select the input file encoding method.
EChart security options	Opens the *EChart Multiple Instance User Configuration* dialog to select fields the end user can see when selecting a record in secured ECharts.
Real-time connection configuration	When using Aquire Unifi web service, opens the *Real-Time Connection Configuration* dialog to enable real-time connection and test web service.
Search options	Lists options to customize the *Search* dialog or enable a prompt message when searching beyond displayed levels.
Tree View options	Lists options on how to display data in the Tree View.
List View options	Lists option to show all displayed positions.

Menu Option	Description
Profile View options	Lists automatic display options of **Box Title**, **Job Title**, or **Position**.
Summary options	Lists the option to exclude managers in their own head count totals.
Group display options	Lists the option to automatically display the group selected in the Groups View in the Chart View.

Help menu

Menu Option	Description
User Manual	Opens the OrgPublisher help file.
Help pointer	Select to move the pointer and click on a button or view to display a help topic.
Getting Started Guide	Opens the *OrgPublisher Getting Started Guide* PDF document. This guide describes core features and helps you quickly create a chart.
Support Portal	Opens the Aquire Support Portal web page.
Tip of the day	Select to view and enable or disable the *Tip of the Day* dialog when opening OrgPublisher.
About OrgPublisher	Displays the OrgPublisher version, copyright, contact, license, and trademark information.
License Information	Opens the *Licensing Information* dialog; displays the current license key, features and expiration information; you can also enter a new key using this dialog.
Send Feedback to Aquire	Open your system email client with feedback@aquire.com in the **To** field.

Publish ECharts

The EChart publishing format enables you to publish extremely large charts to your Microsoft® IIS (ISAPI enabled) Windows® XP, Windows® 2003 web server, Windows® 2008 web server, or Apache™ HTTP Server 2.0+ running Windows. See the complete EChart Rich Client Publishing Requirements or EChart Thin Chart Publishing Requirements. Please review the Publish EChart Thin Client section of this document for more information on thin client publishing.

If there are multiple listings of the same user ID in a secured EChart, you can enable the end user to choose the applicable record. Also, when publishing ECharts you can secure a style to a group. When you publish a chart for planning, you can assign group access to planning charts and set default options for change reports used with planning charts as well as the new comparing charts feature.

The Publishing Wizardattempts to verify that the chart you want to publish as an EChart qualifies as a valid candidate. This is done by a "behind the scenes" calculation of records and custom fields . A chart with as many as a million records can be published as an EChart.

In addition, EChart publishing enables you to set chart security at the user and field level, as well as select proxy server mode security.

The main consideration to keep in mind is that a candidate for an EChart is one the requires Windows NT operating system authentication to secure it, or one in which the combination of the number of records and custom fields results in a very large file. Publishing in EChart Rich Client Format provides the following benefits.

EChart publishing can:

- Produce real-time charts.
- Build extremely large charts with improved intranet/Internet load time.
- Generally enhance construction of large org charts.
- Perform more effectively over dial-up connections.
- Publish a thin client chart to a server, eliminating the need to install the PluginX on all desktop PCs.
- Reduce the time necessary to sort through the records list in the List View.

- Use Windows NT authentication to secure your chart.

If you want to schedule an EChart to publish automatically, you can use Microsoft Task Scheduler.

You can also review Troubleshooting Tips for Published ECharts if your end users encounter difficulties opening a chart.

In order to publish an EChart, you must:

- Set up a Microsoft® IIS (ISAPI enabled) Windows® XP, Windows® 2003 web server, Windows® 2008 web server, or Apache™ HTTP Server 2.0+ running Windows.

1. Create a virtual directory with execute permissions for scripts and executables.
2. Verify that EChart files, **OCP**, **DLL**, **HTM**, **OCS** (created when you publish an EChart), exist in the same directory.
3. Follow the Publishing Wizard, selecting EChart as the publishing format.

Note: *The EChart htm file must be closed in order to publish successfully. If it is open when you attempt to publish the EChart, an error message displays stating that access is denied. Simply close the file and publish again.*

Publishing Definitions

When you publish a chart or a portion of a chart with the *Publishing Wizard* or *Publish charts* dialog you are creating a publishing definition that OrgPublisher automatically saves and adds to a list of existing publishing definitions. The publishing definition is automatically named the same as the **Box title** of the top box that is displayed when you publish the chart, which you can modify. If you have already published a chart, the *Publish charts* dialog is available to create new or updated publishing definitions.

Note: *The OrgPublisher Web Administration Server allows you to publish charts manually. You can, however, open the desktop OrgPublisher version and schedule the publishing definition in the Publish charts dialog using the Web Administration SourceCharts folder.*

When you create a publishing definition in the *Publishing Wizard* or *Publish charts* dialog, you select:

- The publishing definition name.

- A publishing format, for example PluginX.
- The location of the published chart.
- Whether or not you want to overwrite the existing HTM file.
- Whether or not you want to send to an FTP web server.
- Whether or not you want to enable org model planning.
- A chart style.
- The toolbars or buttons published with the chart.
- The chart or portion of the chart to be published.
- End user capabilities, such as copy, print, or save.
- A link to a custom PluginX help file.

Entering Connection String for a Unifi Style Chart

When you create a chart using a Unifi style, you can use the Connection Builder to build the connection string and navigate to the style location.

1. Begin the New Chart Wizard and select Unifi style. Click **Next**.
2. Click **Connection Builder** to open the system Data Link Properties dialog. In the **Provider** tab, select the **OLE DB Provider(s)** from the list, for instance **Microsoft OLE DB Provider for SQL Server**. Click **Next**.
3. In the **Connection** tab, type or click the down-arrow in the **Select or enter a server name (Use data source name)** field to select the source or server. Select the source or server from the list.
4. In the **Enter information to log on to the server** area, (if applicable, select the **Use a specific user name and password** field radio button) type the **User name** and **Password**.
5. If applicable, select either the **Blank password** or **Allow saving password** check box.
6. Select either the **Select the database on the server** or **Attach a database file as a database name** radio button and type the applicable database information.
7. Click **Test Connection** to very the database information is correct.

8. Click **OK** to close the *Data Link Properties* dialog and return to the OLE DB connection string dialog. It now contains the connection string information. Click **Next**.

9. Complete the New Chart Wizard to create your chart.

Understand Summary Field Values

You use the values in the *Custom Field Properties* dialog to insert a summary field into your organizational chart. When building from data, OrgPublisher writes (and rewrites as data refreshes) to numeric fields based on calculations.

Note: *If you renewed maintenance from a previous OrgPublisher Enterprise version that included the organizational planning client, that feature is included in the OrgPublisher 9 version.*

When selecting a summary field you are prompted to select a field type, for instance **Average** or **Percentage**, and what population you want to include in the calculation. When your chart is republished or refreshed, these data fields may change, depending on your source data.

Note: *The Summary View is not available in published real-time charts.*

Succession candidates are not included in head counts or summary totals.

In conditional formatting, the search feature and all calculations follow the conditional position type. Formatting follows the group. If you display the Summary View in a chart with conditional formatting, you should hide either the group or position type of the conditional format. If you don't, head counts display in both areas.

These values help you select the type of summary you want.

Value	Description
Field label	The name of the custom field. Click inside the field to change the field label. Changes are made across all styles.
Type	The custom field type helps determine the format of the displayed information and the type of summary field you insert. Click inside the field to view the drop-down list. The custom field type is across all styles. Values include: **Text**, **Hotspot**, **Numeric**, **Currency**, **Count**, **Sum**, **Average**, **Minimum**, **Maximum**, **Percentage**, **Date**, **Email**, **Position ID** Before you can create a summary field, you must insert a numeric custom field.
Calc Field	The calculation field provides a list of numeric custom fields that have already been inserted into the chart. Click inside the field to choose the field on which you want to base the summary processing. This calculation field is across all styles.
Population	The population determines which position types or groups are included in the summary. The selected population is across all styles. Values include: Position types and groups defined in your chart
Assigned To	The position type specifies where the roll-up is displayed in the chart. You can select one or more position types or groups, if applicable, or leave the field blank if you do not want the field displayed. Values include: **All Position Types**, individual position types, and groups defined in your org chart

Use a Virtual Directory

When you publish ECharts (desktop OrgPublisher or Web Administration), whether to a rich client or thin client, or when you publish a real-time chart, you publish to the physical directory but the reference to the chart (or web page) using HTTP must reference the virtual directory, if your web server uses one. If not, use **HTTP://mychart.htm** in the URL field in the Publishing Wizard.

Verify that the chart is published to a virtual directory with execute permissions. If you are not sure of the structure of your web server, please contact your Web administrator.

Use Conditional Formatting with Other Features

Some tips for using conditional formatting with other OrgPublisher features.

- **Secure custom fields** - It is recommended that you do not create a conditional position type based on secured fields, because for performance reasons, the EChart server caches data that hampers the accurate processing of conditional position types based on secure fields.
- **Chart security** - You can use both features at the same time.
- **Group icons** - The use of group icons and conditional formatting are meant to highlight different aspects and it is not recommended to use both features at the same time. Groups based on several criteria should not be used with conditional formatting.
- **Multiple reporting relationships** - You can use both features at the same time.
- **Advanced Box Layout Editor** - You can use both features at the same time.
- **Custom fields** - You can use both features at the same time, except for the note above about secured EChart fields.
- **Position types** - The conditional position type displays in the OrgPublisher application and PluginX chart. The original box type assignment remains the same. You can see the original position type in the Update Person dialog.
- **Building from data** - OrgPublisher calls the original position type from your data source and uses the conditional position type for formatting only.
- **Publishing** - You can use both features at the same time.
- **Reporting line formatting** - Reporting line formatting is based on the conditional position type.
- **Printing** - You can use both features at the same time.
- **Sorting chart boxes** - You can use both features at the same time.

- **End user accessibility** - Because this feature is designed to work with screen reading software for the blind and visually impaired, conditional formatting is not compatible with accessibility.
- **Searching** - This feature follows the conditional position type. If there is more than one group-based position type for which a person qualifies, the first match is used in search and summary tasks.
- **Summaries** - Summary counts are based on the conditional position type. If there is more than one group-based position type for which a person qualifies, the first match is used in search and summary tasks.

Work with Signed and Read-Only Archive Charts

You can use OrgHistory to take a "snapshot" of your organizational chart and archive it for reference at a later time. The OrgHistory Archive Wizard walks you through selecting a directory location, assigning a name and password, as well as add a signature to the archive.

- OrgHistory defaults to **Sign archived charts**, which means that if the archived chart is created and opened in OrgPublisher 7 and later, it cannot be modified. However, the archived chart can be modified if it is opened from a previous version of OrgPublisher or in a hex editor.
- When you open an altered "signed" archived chart in OrgPublisher 7 and later, you receive a message telling you that it has been modified. You can choose not to archive a chart with a signature by clearing the check box in the *OrgHistory Archive Wizard*.
- OrgHistory also defaults to **Mark archived charts as read-only**, which means that the "read-only file" system flag is set. The chart can be overwritten if the flag is removed. You can choose not to archive as read-only by clearing the check box in the *OrgHistory Archive Wizard*.

Note: *Always open the OrgHistory Archives dialog to verify that your scheduled chart archived at the correct time.*

If you are working with the OrgPublisher Web Administration server, all archived charts will be created in the server ArchivedCharts folder. In addition, if end users must access archived charts, they must be stored in the SourceCharts folder.

You can create a "read-only" archived chart just once a day (using the One time only scheduling option). If you want to archive an updated version of your "read-only" chart, you can schedule it to run the next day.

A "read-only" archived chart can be overwritten with an updated version of the same chart. A message displays verifying that the end user wants to overwrite the "read-only" archive.

System Requirements and Chart Parameters

Chart Parameters

- As a general rule, the maximum chart width (number of boxes currently displayed) is approximately 32,000 characters, which is equivalent to about 1,500 boxes wide using OrgPublisher's default setting. If necessary, you can adjust the box width to 15 and the horizontal spacing to 2 in order to create a chart 1,800 boxes wide. If you use the drilling feature, you may have more than 1,500 boxes in width.
- The default maximum number of organizational levels in the Chart View is 500.
- Each field has a maximum length of 1,000 characters.
- The number of boxes, jobs, open positions and people per chart is limited only by the amount of memory in your PC.
- There is no practical limit to the number of jobs, open positions or people per box.
- The maximum number of nodes in the Tree View is 6,537.
- The maximum number of characters in the *Tree View* is 32,000.
- Only one level of direct reports can be assigned to assistant boxes.
- The default maximum number of records that can be called for EChart Rich Client printing is 5,000.
- The default maximum number of records that can be called for EChart Thin Client printing is 500.
- The default maximum time an EChart Thin Client will remain open and inactive before logging out the end user is ten minutes.
- The default maximum number of chart builds cached for EChart Thin Client is 200. (Secure charts are not cached.)
- The default number of cached chart builds that are purged once the limit is reached is 40.

Browser Requirements

Browser requirements to interactively view charts residing on a web server or platform:

- Microsoft™ Internet Explorer 6.x and later

Power users of OrgPublisher PluginX require:

- Microsoft Internet Explorer 6.x and later
- 60 MB available hard disk space
- 128 MB RAM

Minimum System Requirements

- Pentium PC compatible or greater
- 512 MB of RAM
- 60 MB available hard disk space
- Microsoft® Windows® XP or Windows® Vista™ operating system
- Adequate storage space for charts

EChart Thin Chart Publishing Requirements

- Compatible with Microsoft Internet Explorer 6.0 and later
- Some advanced features may require "cookies" for full functionality
- Browser must be JavaScript enabled
- A Microsoft® IIS (ISAPI enabled) Windows® XP, Windows® 2003 web server or Apache™ HTTP Server 2.0+ running Windows
- Web server must grant execute permission to thin client virtual directory
- Web server must have 1.5 MB of free memory for every 1,000 boxes charted

Chart viewing for typical end user requirements:

- Microsoft® Internet Explorer 6 and later for all versions of Windows® mentioned above

- 128 MB of RAM
- 60 MB available hard disk space
- Available for all web servers, EChart server recommended

EChart Rich Client Publishing Requirements

- Pentium PC compatible or greater
- A Microsoft® IIS (ISAPI enabled) Windows® XP, Windows® Vista™, Windows® 2003 web server, or Apache™ HTTP Server 2.0+ running Windows
- A virtual directory with execute permissions for scripts and executables on the web server
- 60 MB available hard disk space
- 512 MB RAM, depending on chart size
- URL to virtual directory available at publishing time

If publishing real-time:

- Microsoft Data Access Components (MDAC) 2.6 or higher
- ASP.NET support on the web server
- EChart that has been created using an ODBC connection
- Chart must be published to a virtual directory
- Real-time connection with Web service URL must be configured first

Real-time Chart Publishing Requirements

Requirements for publishing real-time charts include:

- Microsoft Data Access Components (MDAC) 2.6 or higher
- ASP.NET support on the web server
- EChart that has been created using an ODBC connection
- Chart must be published to a virtual directory

Note: *Real-time publishing is not available when creating a chart from multiple databases.*

Web Administration Requirements

Web Administration enables you to use the OrgPublisher application from any location. The requirements are:

- Pentium PC compatible or greater
- 128 MB RAM
- 60 MB available hard disk space
- A Microsoft IIS (ISAPI enabled) Windows XP, Windows 2003 web server, Windows 2008 web server, or Apache 2.0+ running Microsoft Windows
- A virtual directory with execute permissions for scripts and executables on web server

Planning Chart User Requirements

- Pentium PC compatible or greater
- 256 MB RAM
- 60 MB available hard disk space
- Microsoft® Windows® XP, or Windows® Vista™ operating system
- A virtual directory with execute permissions for scripts and executables on web server

CHAPTER 15

TROUBLESHOOTING

Note: *Web servers do not allow clients to schedule tasks. The OrgPublisher Web Administration Server allows you to publish charts manually. You can, however, open the desktop OrgPublisher version and schedule the publishing definition in the Publish charts dialog using the Web Administration SourceCharts folder.*

1. Log on the server as an administrator or power user.

2. Open the desktop OrgPublisher application. (If default install is used, it would be in c:/program files/orgpubx).

3. Open the chart (found in the SourceCharts folder).

4. Schedule the publishing definition in OrgPublisher using the Schedules tab.

Also, when you are publishing to ECharts, you must manually schedule the BAT file created in the first manual publishing. To do this, open the Task Scheduler on the server to add the .BAT job.

Troubleshooting Automatic Publishing

If you are experiencing problems with automatic publishing using the Publish charts dialog, check to ensure:

- you have local Administrator group privileges on Windows® XP, Windows® 2003 web serve, Windows® 2008 web server, or or Apache™ HTTP Server 2.0+ running Windows. These privileges are required in order to set up or run a job automatically.
- Microsoft Task Scheduler is installed. This is a Microsoft program, usually installed as a component of Microsoft Internet Explorer.
- you are not using letter-mapped drives for automatic publishing (e.g., G:\NetworkPath\FileName). In some cases they are not recognized when running jobs off-line. Instead, use UNC to specify network paths (e.g., \\ServerName\Path\Filename).

Error messages can be generated in two different log files:

1. Look for the log in the **c:\program files\OrgPub(x)\OPAutoPub.log**. (The (X) is the version number of your OrgPublisher installation, for example, OrgPub9.) Find the

date and time the job was supposed to run, and check for any error messages.

2. Check the message log for the Microsoft Task Scheduler by clicking **Advanced** then **View Log**. Look for errors such as "file not found" or "password not valid" based on date and time the job should have run.

Tips for Automatic Publishing

Diagnosing common problems:

- Did the job ever run before?
  - Yes, the job has run before.
  - No, the job has never run automatically.
- Did you select the FTP option?

If you experience problems such as,

- the **Schedule Status** tab's **Status** field reads **Never Published** or it is blank, or
- if Microsoft Task Scheduler indicates that the publishing job ran, but your chart is not published or updated

you can use the *Troubleshooting Automatic Publishing* procedure.

Troubleshooting Automatic Publishing procedure

1. In the *Publish charts* dialog, in the **Schedule Status** tab, click **View log**. The **OrgPub32.LOG** opens in Microsoft Notepad. You can use this as a diagnostic tool by reviewing the schedule information.
2. If you see the **Never published** message after you have scheduled a chart to publish, you are probably still working in that org chart in OrgPublisher. Update your schedule to a new publishing time and close the chart.
3. If Task Scheduler indicates that your publishing job ran but your chart is not published or updated, or you can publish charts while you are logged on but they do not publish while you are logged off, there may be a conflict with Microsoft IIS. Open the **Task Manager** and click the **Processes** tab. If **OrgPub32.exe** is still running, this may be an indication that an IIS conflict exists.

If you installed OrgPublisher on an IIS server to automatically update charts, you may need to alter your default Distributed COM (DCOM) settings to allow authentication from any user in the local Administrators group. Note that changes to the default security settings can alter other permissions.

IIS alters the default DCOM security access settings, adding its own set of permissions that allow external access by users to Internet pages, thus changing the default security template and excluding permissions previously set up. An administrator must add the local Administrators group to the default security access list in the DCOMCNFG.EXE utility.

To add the local Administrator group to DCOMCNFG.EXE

1. Execute **DCOMCNFG.EXE**, usually found in the Windows system directory.
2. Select the **Security** tab.
3. Click **Edit Default** for the *Default Access Permissions* dialog.
4. Click **Add**.
5. **Browse** the local computer and select the local Administrators group.
6. Click **Add**.
7. Click **OK**.

When next you schedule a chart to publish while you are logged out, it should publish successfully.

If you are using FTP, you must have authority to write to the target server directory. The FTP server authority must be set to recursive to allow you to put the file in a directory you create. Otherwise, it will place your files in the server's root directory.

Troubleshooting Tips for Published ECharts

If you are experiencing problems with published ECharts, these tips may answer your questions.

Thin client charts with photos published via Web Administration:

Check with your system administrator to discuss the following.

- Photos will not display on a secure URL (https).
- The network requires photos be handled by the **LocalSystem** account. The **IUSR** does not have access to the LocalSystem Temporary Internet Files to read cached photos. This can be changed by granting the IUSR read access to the Temporary Internet Files.
- The LocalSystem home directory is **C:\Documents and Settings\LocalSystem**. The administrator can right-click on this folder and select **Properties** and **Grant IUSR_MACHINENAME Read access only** to the directory.
- In addition, the virtual directory must be set to run applications in the IIS process. The virtual directory property **Application Protection** should be set to Low.
- Windows XP, under **Tools>Options>View**, the administrator can select **Show hidden files and folders**.
- Changing the IIS user to be a privileged user is not recommended.

Refresh or display troubleshooting

- If your EChart does not display, you may get the error message "**Unable to contact the EChart server at ...**", verify that the virtual directory where the EChart files reside has execute permissions.
- If you generated the chart by a scheduled batch file, verify that you are not using letter-mapped drives. For example, use "**\\MyServer\path\filename**."
- Check your output file name in the publishing definition and remove any spaces or special characters in the output file name and any spaces in the definition name.
- Verify that the chart is published to a virtual directory with execute permissions.
- Run the three separate batch file commands individually on the "command" line and verify the results. The data should be unloading and reloading each time you publish.
- Look for generated errors in **Task Scheduler>Advanced>View Log**.
- Check the **c:\Program Files\OrgPub(version #)** directory for the **ORGPUB32.log** to review any errors that may have been generated at publishing.

- Verify that the chart administrator has authority to write to all folders in the tree/path to the directory if you can't find a log. Go to Windows Explorer and right-click on the appropriate folder. Select **Properties** then the **Security** tab. Select the name to view the permissions.
- Verify the time and date stamp on the output file coincide with the time you published the chart.
- Stop and restart Microsoft IIS through the **Control Panel>Administrative Tools>Services>World Wide Web Publishing Service**. Right-click on **Restart**.
- Verify that there are no **ORGPUB32** hung instances by looking in the **Task Manager**. There must be no OrgPub32 processes running before the next one can start.
- Reboot your server.

Print troubleshooting

- If you want to override the print default of 5,000 records, you can manually adjust the registry setting in the client's machine registry.
  - Select **Start>Run>regedit** and locate **HKEY_LOCAL_MACHINE>SOFTWARE>Aquire>OrgPublisher(version #)>Publish**. Change the **EChartPrintLimit** record to the number you want to print. This becomes the new default print limit for ECharts.
  - We recommend printing from within the OrgPublisher application on a PC with the capacity to handle very large charts. Printing enormous ECharts from the browser downloads all of the "person" data to the client machine. The network will experience a great deal of traffic and use much, if not all of the RAM on the client machine.

If the above tips do not resolve your issue, contact Aquire Product Support at support@aquire.com.